

Chapter 4

COREDOC

Overview

Introduction This chapter explains the use and functionality of the Department of Defense Core Document System (COREDOC). COREDOC is an application included in the modern DCPDS as part of the Position Management and Classification function. It includes a cover sheet, position description, performance plan, training competencies, and knowledge, skills, and abilities (KSAs) for staffing.

Chapter Contents

Topic	Page
Overview	1
Accessing and Navigating in COREDOC	2
Creating A Core Document	11
Viewing and Printing an Existing Core Document	45
Modifying a Core Document	49
Attaching a Core Document to the Request for Personnel Action (RPA)	81

See Also



Module 1, Fundamentals of the Modern DCPDS
 Module 2, Position Management and Classification Using the Modern DCPDS
 Chapter 2, Building Positions
 Module 3, Processing Requests for Personnel Actions Using the Modern DCPDS
 Chapter 1, Processing a Request for Personnel Action

Before you Begin

- Component use of COREDOC is optional.
 - NAF does not use COREDOC.
 - All Agencies may not use the Performance Plan.
 - Neither the General Schedule Supervisory Guide (GSSG) nor the GS Leader Grade Evaluation Guide is presently available.
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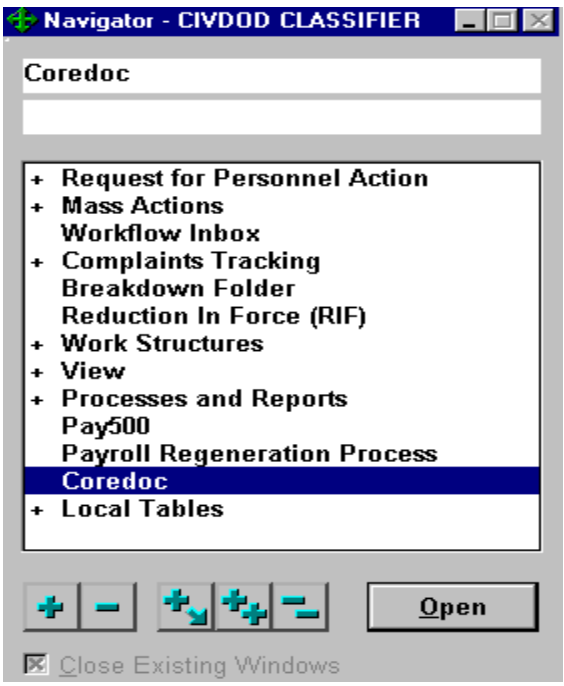
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Accessing and Navigating in COREDOC

Purpose This section explains how to access the COREDOC Application and navigate through the system using the menu items, user default information data fields, and exiting.

- Section Contents**
- Accessing COREDOC
 - COREDOC Main Menu Bar
 - File Menu
 - Utility Menu
 - User Default Information Window
 - Window Menu
 - Help Menu
 - Exiting COREDOC

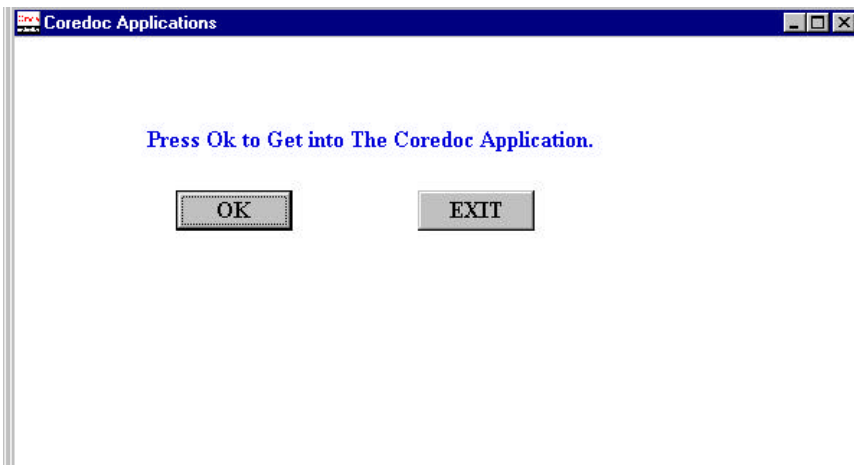
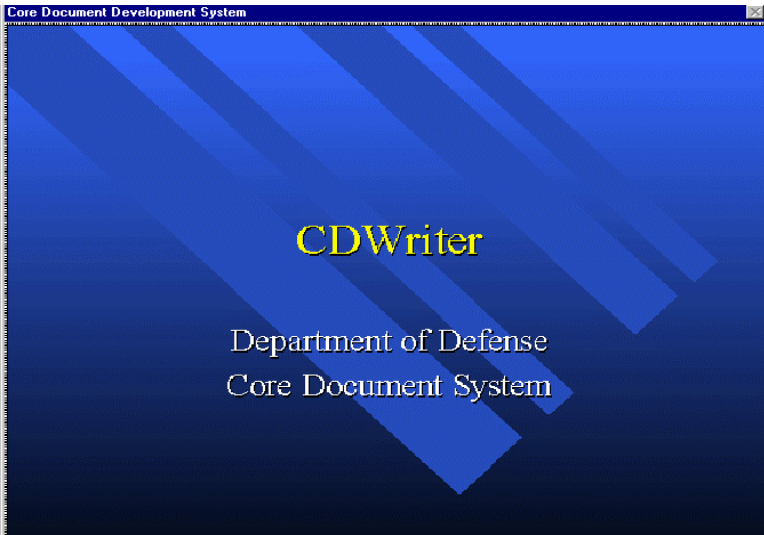
Accessing COREDOC

Step	Action
1	<p>From the Responsibilities Window, click your assigned Responsibility → <OK>. The Navigation List displays. Click <i>Coredoc</i> → <Open>.</p> 

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Accessing and Navigating in COREDOC, Continued

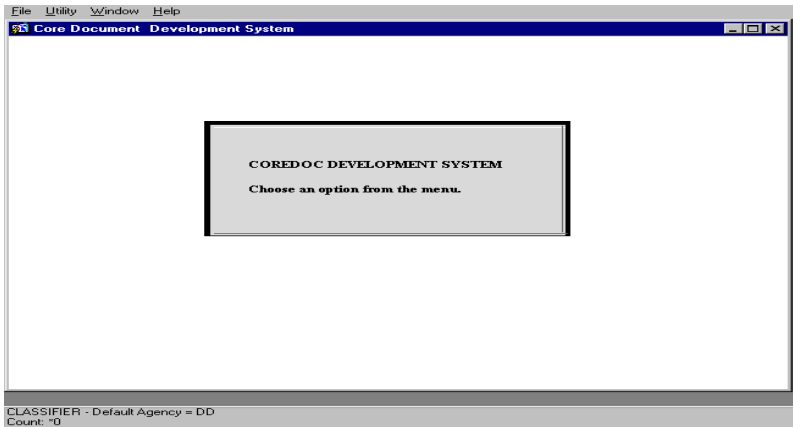
Accessing COREDOC (continued)

Step	Action
2	<p>The Core Applications Window displays. Click <OK>.</p> 
3	<p>Clicking <OK> displays the Core Document Development System Title Window before the Core Document Development System Window is displayed.</p> 

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Accessing and Navigating in COREDOC, Continued

Accessing COREDOC (continued)

Step	Action
4	<p>The Core Document Development System Window displays with the Main Menu Bar selections for accessing the COREDOC processes and functions.</p> 

COREDOC Main Menu Bar

The four main menu selections are described below.

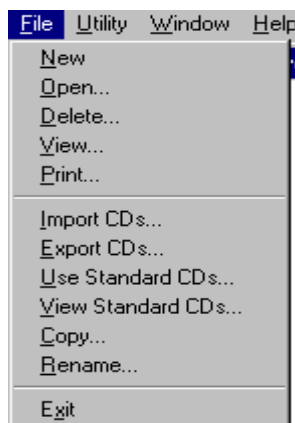
Menu Item	Description
<u>F</u>ile	Allows you to perform a variety of processes and functions. You can create, delete, view, print, import, export, copy, use and view standard core documents (CDs) or rename them.
<u>U</u>tility	You can establish system-generated defaults for the CD. In addition, users with “Classifier” or “Super User” role can assign a Civilian Personnel Control Number (CPCN) to a CD.
<u>W</u>indow	You are provided three choices for displaying open windows in COREDOC. You can arrange them according to viewing preference.
<u>H</u>elp	Provides Help System Maintenance entries and general information About CD Writer.
	Note: <u>O</u> pen, <u>D</u> ele t e, <u>V</u> iew, <u>P</u> rint, <u>C</u> opy, <u>R</u> ename are grayed out, until a new COREDOC is created.

Continued on next page

Accessing and Navigating in COREDOC, Continued

File Menu

The **F**ile menu is used to perform a number of functions. To access the **F**ile menu, click **F**ile on the Main Menu Bar. The following menu displays.



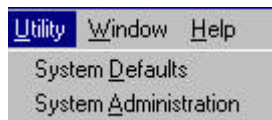
Click	To.../Function
N ew	Create a new core document (CD).
O pen...	Open an existing CD. See <i>How to Modify a Core Document</i> in this module for additional information.
D elte...	Delete an existing CD.
V iew...	View a CD while working in the application. See <i>How to View a Core Document</i> in this module for additional information.
P rint...	Print a copy of a CD.
I mport CDs...	Import COREDOC is not available.
E xport CDs...	Export COREDOC is not available.
U se Standard CDs...	Copy a core document from the standard library, if necessary.
V iew Standard CDs...	View a standard core document.
C opy...	Duplicate an existing regular or standard core document in your directory.
R ename...	Assign a new name to an existing regular or standard CD.
E xit	Exit from CD Writer to the COREDOC Applications Window. You can continue the E xit process and return to the N avigator Window.

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Accessing and Navigating in COREDOC, Continued

Utility Menu

Click **Utility** on the Main Menu Bar to access the **Utility** menu.



Option	Available for
Systems Default	Any user of the COREDOC Application.
System Administration	Users who have been designated as Systems Administrators for the COREDOC Application.

User Default Information Window

The **User Default Information** Window displays when **Utility** is clicked on the Main Menu Bar. The data areas are described below.

 A screenshot of the 'User Default Information' window. The title bar reads 'Privacy Act of 1974 - [Core Document Development System - User Default Information]'. The window contains several fields and checkboxes:

- Oracle User ID:** MCKNIGC
- Output Format:** Radio buttons for 'Core Document' (selected) and 'Position Description'.
- On/Off Settings For:** Checkboxes for 'Critical/Noncritical' (checked), 'Percentage for FWS Positions' (checked), 'Show KSA Linkage To Specific Duties' (checked), and 'Automatic Staffing KSA Selections' (checked).
- Agency Code:** Text field with 'DD'.
- CoreDoc Access:** Text field with 'C'.
- Import/Export CDs:** Checkboxes for 'Import CDs' (checked) and 'Export CDs' (unchecked).
- Organization Name:** Text field with 'CPMS'.
- Organization Goals:** A large text area containing 'Support DoD organizational goals.'.
- Buttons:** 'Save' and 'Exit' buttons at the bottom.

The first time you access COREDOC, you will be prompted to complete the blank **User Default Information** Window. This window allows you to enter certain defaults and establish a standard **Name** and **Goals** for the organizations for which you have responsibility. The information that you type in the data fields will be generated on each CD that you process, eliminating the need to retype the information.





Note: The Window has predetermined defaults that may or may not be compatible with the organization you service. You must review the defaults and make the appropriate changes to the data fields.

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Accessing and Navigating in COREDOC, Continued


User Default Information Window (continued)

User Default Information Window Data Field	Description
Oracle User ID	Contains the Oracle User Identification assigned to you. This field cannot be modified.
Output Format 	You can determine the type of output desired, e.g., CD or Position Description. Note: It is recommended you retain the CD as the default.
On/Off Setting For:	You can “✓” on or off for any of the boxes next to the settings by clicking inside the box. The settings are described below. <ul style="list-style-type: none"> <input type="checkbox"/> Critical/Noncritical – automatically designates all selected duties as critical when activated. <input type="checkbox"/> Percentage for FWS Positions – you should not select this option unless your Agency/Organization requires duty percentages to appear for wage grade positions. <input type="checkbox"/> Show KSA Linkage to Specific Duties – allows you to show the linkage between a selected duty statement and competency (KSA) for a CD. <input type="checkbox"/> Automatic Staffing KSA Selections – allows automatic selection of KSAs for a CD.
Agency Code 	Designates the format of the core document, and in particular, the Performance Management Plan. Click the Agency Code data field to access the drop-down menu, highlight your agency, and click <OK>. You can select from the choices indicated on the drop-down menu (Air Force, Army, DoD, Marines, National Guard, and Navy). Note: The Fourth Estate Agencies and other Agencies should use the “DD” Agency Code.

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Accessing and Navigating in COREDOC, Continued

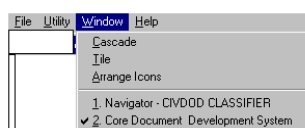
User Default Information Window (continued)

Data Field	Description
Coredoc Access	Indicates the status that you are using to access the User Default Information Window. The system default is a Classifier. The other options are “S” for Super User, and “M” Coredoc Manager.
Import CDs	Import CDs is not available.
Export CDs	Export CDs is not available.
Organization Name	Allows you to enter a default Organization Name . The information that you type in this data field will be generated on each CD that you process, eliminating the need to retype the information.
Organization Goals 	Allows you to enter default Organization Goals. The information that you type in this data field is generated on each CD you process, eliminating the need to retype the information. Note: You should always check the Systems Default information to be sure it is correct for the organizations for which you have responsibility.
Save/Exit	Once you have selected all the system defaults, click <Save> to save your information and return to the Core Document Development System Window. <i>Or</i> Click <Exit> to return to the Core Document Development System Window and not save your changes.

Window Menu The **Window** menu provides three choices for displaying open windows; you can arrange them according to your preference for viewing.

The **Window** menu also lists all windows you currently have open, including your sign-in “responsibility” (listed in the **Navigator** Window).

To access the **Window** menu, click **Window** on the Main Menu Bar.



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Accessing and Navigating in COREDOC, Continued

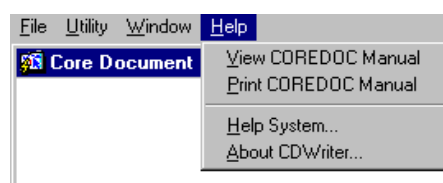
Window Menu

Choice	Action
C ascade	Displays open windows in a “cascaded” or stair-step fashion.
T ile	Displays open windows in a “tile” (non-overlapping fashion).
A rrange I cons	Arranges the icons of any minimized windows side-by-side in the lower left of the window.

Help Menu

The **H**elp Menu provides Help System Maintenance entries and general information About CD Writer.

To access the **H**elp menu, click **H**elp on the Main Menu.



Menu Item	Description
V iew C OREDOC M anual	Provides a view of COREDOC Manual from Integrated Personnel Process Improvement (PPI) release.
P rint C OREDOC M anual	Prints the COREDOC Manual from the Integrated PPI COREDOC manual on-line without exiting.
H elp S ystem	Provides general information about the purpose and functionality contained in the COREDOC software.
A bout C D W riter	Provides general information about the CD Writer COREDOC software.

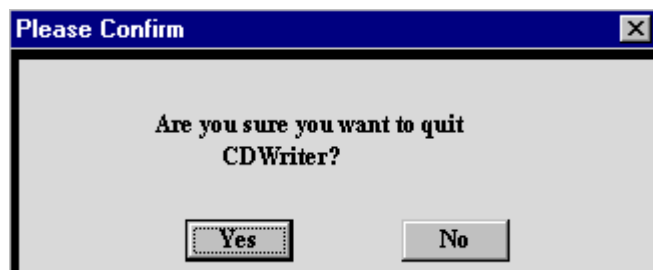
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Accessing and Navigating in COREDOC, Continued

Exiting COREDOC

There are a number of methods to exit COREDOC:

- Click <**E**xit> from any of the application windows, and follow the directions on the windows to continue the exiting process, or
- Click **F**ile on the Main Menu; click **E**xit. A **Dialog Box** displays.




- Click <**Y**es> to exit CD Writer and return to the **Navigator** Window.
 - Click <**N**o> to return to the **Coredoc Applications** Window.
-

Creating a Core Document

Purpose This procedure provides information on the process of creating, viewing, and printing a new core document (CD).

- Section Contents**
- Accessing the COREDOC Applications Window
 - Selecting an Occupational Series
 - Naming Core Documents
 - Selecting:
 - Duties for a Regular CD
 - Supplementary Duties for a Regular CD
 - Percentages of Time for a Regular CD
 - Staffing KSAs for a Regular CD
 - Verifying Title, Pay Plan, Series and Grade for a Regular CD
 - Completing Organizational Goals and Purpose for a Regular CD
 - Developing the Performance Management Plan for a Regular CD
 - Using the System-Generating Performance Requirements
 - Entering New Performance Requirements
 - Creating a Standard CD
 - Viewing and Printing a CD
 - Exiting COREDOC
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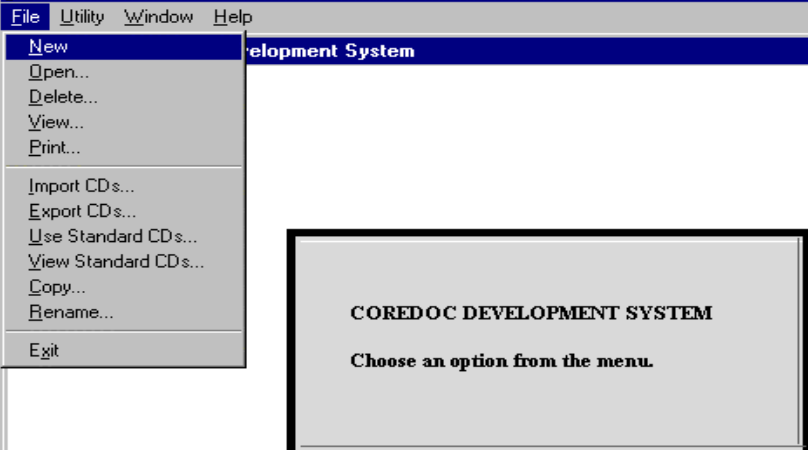
Accessing the Coredoc Application Window

Step	Action
1	Navigator Window → Coredoc → <Open> .
2	<p>The Coredoc Applications Window displays. Click <OK> to display the Core Document Development System Title Window briefly before The Core Document Development System Main Menu Window with the Main Menu Bar displays.</p> 

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Creating a Core Document, Continued

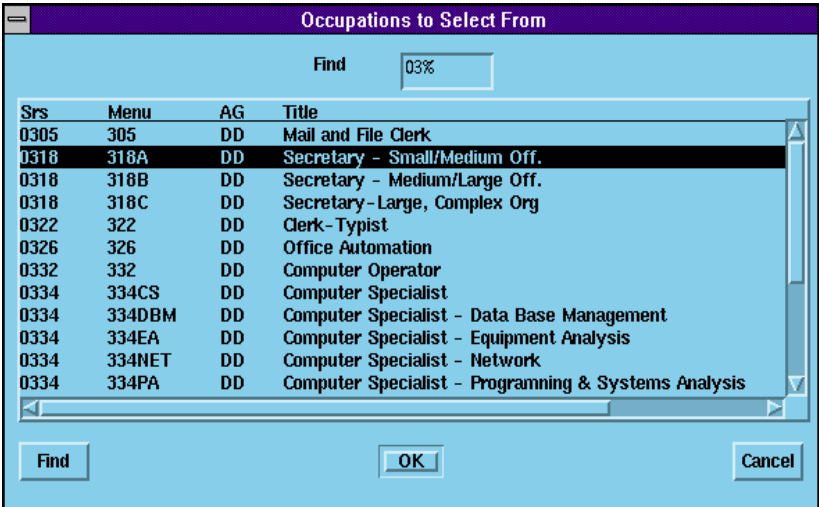

Accessing the Coredoc Application Window (continued)

Step	Action
3	<p>The Core Document Development System Window with the Main Menu Bar displays.</p> <ul style="list-style-type: none"> Click File to display a drop-down menu. Click New to begin the process of creating a core document. 

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Creating a Core Document, Continued

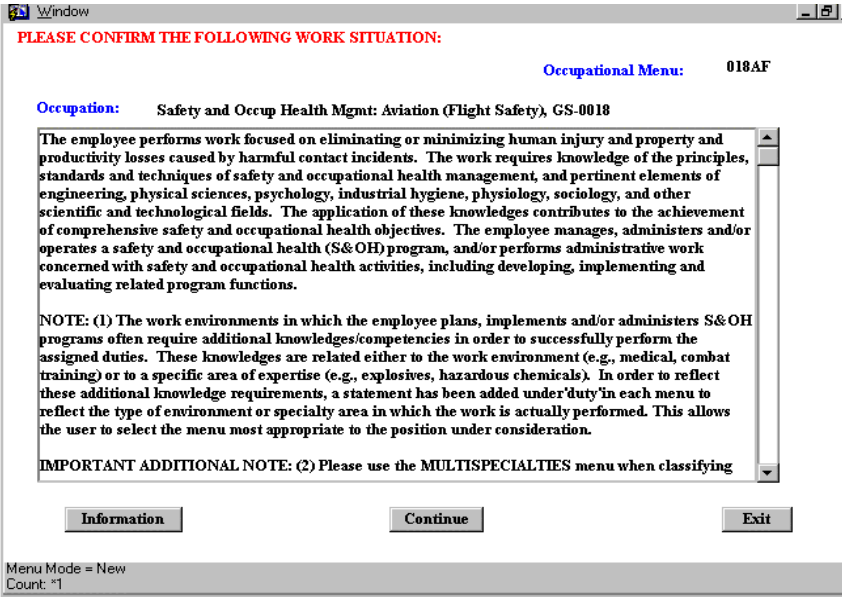
Selecting an Occupational Series

Step	Action
1	<p>The Occupations to Select From Window displays with three Taskflow Buttons at the bottom of the window.</p> <ul style="list-style-type: none"> • Scroll and click the occupation you need for your CD, and then click <OK>, or • Input the Series number in the Find data area followed by a “%” Click <Find>. The series number you designated displays. • From the listing, click the series and occupation you need and click <OK>.  <p> Note: Several series are further defined into a number of occupations. For example, 0318 has other associated occupations listed: 318A, 318B, etc.</p> <p>Additionally, several Primary Occupations require you to select duties from two or more occupational menus. This usually applies when two or more wage occupations of equivalent grade are used in the CD creation process. If you select one of these series you will be returned to the Occupation to Select From Window where another series with an associated occupation may be selected.</p>

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Creating a Core Document, Continued

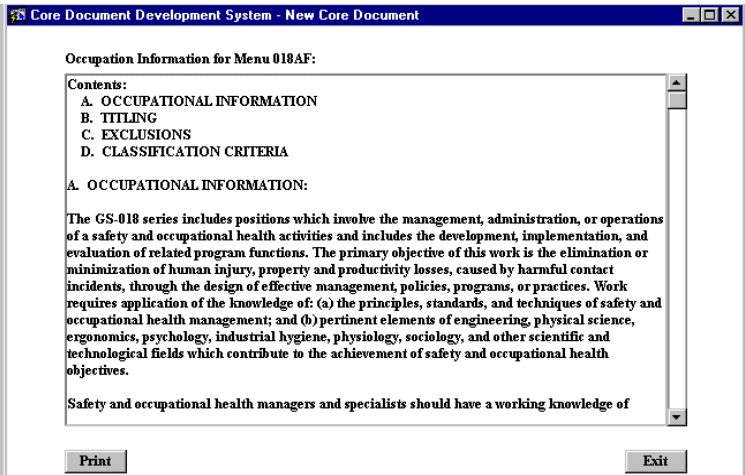
Selecting an Occupational Series (continued)

Step	Action				
2	<p>The Coredoc Document Development System – New Core Document Window with the title “Please Confirm The Following Work Situation” displays with a description of the occupation you selected. Use the scroll bar and scroll through the description to ensure it meets your needs.</p> 				
3	<p>Click one of the taskflow buttons at the bottom of the window:</p> <table border="1"> <tr> <td>Click <Information></td><td>Click <Continue></td></tr> <tr> <td>To display detailed position classification information about the selected series and occupation to read before proceeding.</td><td>To display the Action - CD Type Window when the series and occupation are correct.</td></tr> </table>	Click <Information>	Click <Continue>	To display detailed position classification information about the selected series and occupation to read before proceeding.	To display the Action - CD Type Window when the series and occupation are correct.
Click <Information>	Click <Continue>				
To display detailed position classification information about the selected series and occupation to read before proceeding.	To display the Action - CD Type Window when the series and occupation are correct.				

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Creating a Core Document, Continued

Selecting an Occupational Series (continued)

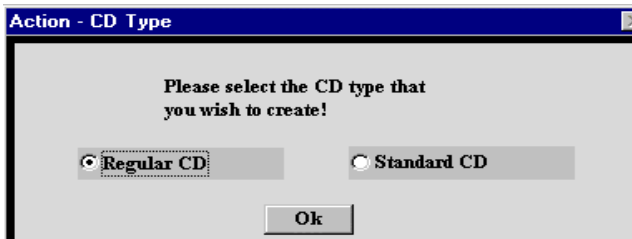


Step	Action
4	<p>If you click <Information>, the Core Document Development System - New Core Document Window displays with detailed information about the selected series and occupation.</p> 
5	<p>Click <Print> to print the information on the occupation, or click <Exit> to return to the Core Document Development System Window.</p>
6	<p>If you click <Continue> on the Core Document Development System Window because the series and occupation are correct, the Action – CD Type Window displays.</p> <p>Click <Exit> on the Core Document Development System Window if the series and occupation are not correct to return to the Core Document Development System Main Menu Window.</p>

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Creating a Core Document, Continued

Naming Core Documents

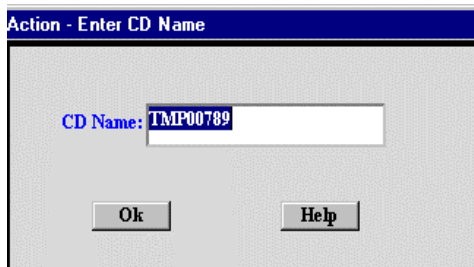

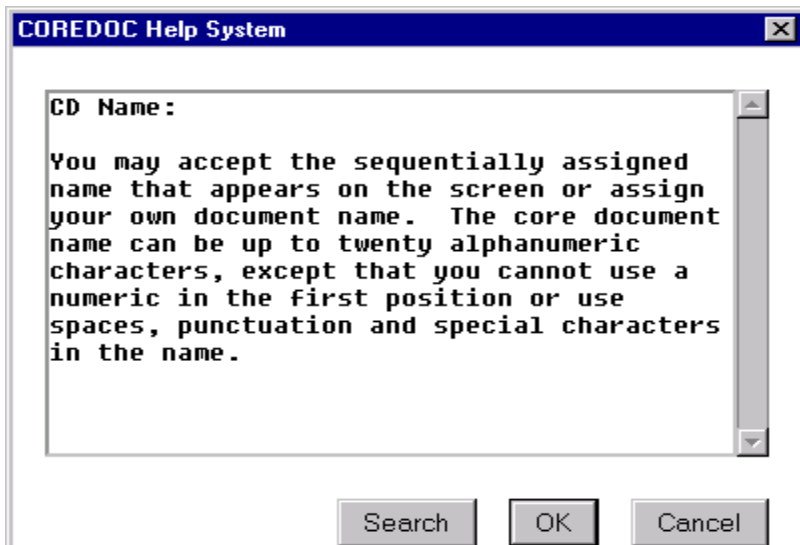
Follow the steps below to select or create your own unique CD.

Step	Action
1	<p>Click <Continue> on the Core Document Development System-New Core Document Window.</p> <p>The Action - CD Type Dialog Box displays.</p>  <p>Select one of the following types of CDs:</p> <ul style="list-style-type: none"> • Regular CD - is based on unique duty requirements or special qualifications of the position. Regular CDs have a system-generated name beginning with “TMP” and ending with a sequential number. • Standard CD - is based on standard duties and qualifications and is normally used Component wide. Standard CDs will have a system-generated name comprised of four parts: <ul style="list-style-type: none"> • The abbreviation, “STD,” • The user’s two-digit agency code, • The four-digit occupational series, • The two-digit grade, and • A sequential number. <p> Note: It is recommended that you establish your own naming convention for both “Regular” and “Standard” CDs. Your CDs are based on your Component’s business rules. You may enter any identifier that does not exceed the allocated space of twenty alphanumeric characters.</p>
2	<p>Click Regular CD on the Action – CD Type Window and click <OK>.</p> <p> Note: A Regular CD is used for illustration purposes only.</p>

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Creating a Core Document, Continued

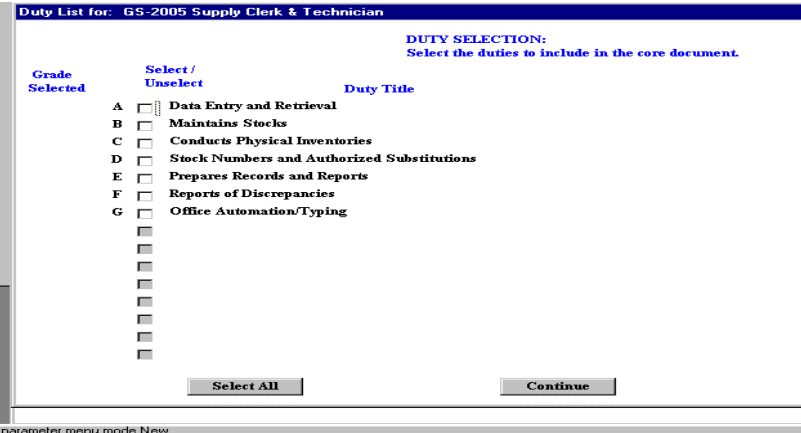


Naming Core Documents (continued)

Step	Action
3	<p>The Action – Enter CD Name Window displays. In the example, a system-generated CD Name of “TMP00789” displays in the CD Name data field.</p>  <p> Note: Click <Help> for the COREDOC Help System Window to display an explanation of the CD Name.</p> 
4	Click <Ok> to accept the system-generated CD Name , or type in your own specific name and number for the CD that meets the business rules of your Component.
5	Click <OK> to display the Duty List Window with the associated duties for the series and occupation you selected.
6	Click <Cancel> to cancel to exit the window.

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Creating a Core Document, Continued

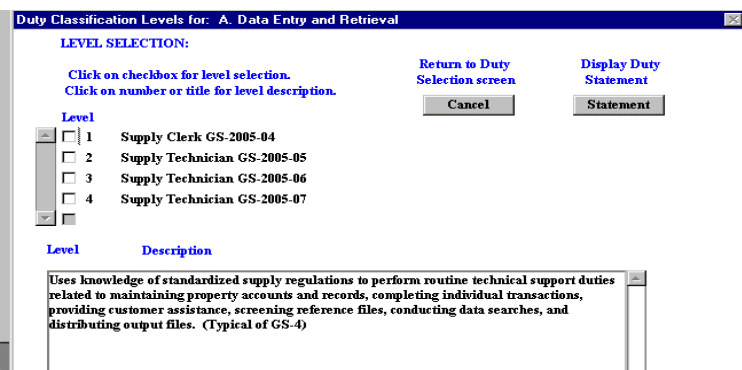

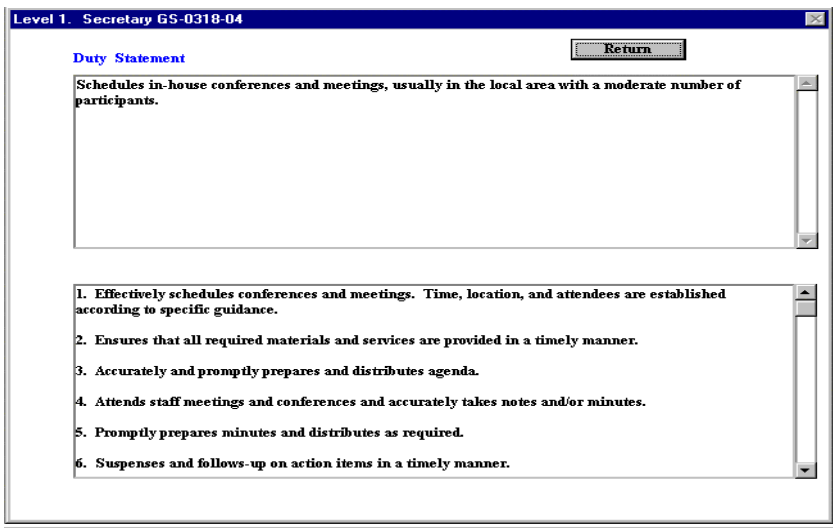
Selecting Duties for a Regular CD

Step	Action
1	<p>On the Duty List for:.....Window, select the duties to include in your CD at this time.</p>  <p> Note: It is not necessary to select all the duties listed for your series and occupation, only the ones that applies to your CD.</p>
2	<p>Click <Select All> to select all the duties listed for the series and occupation.</p> <p>OR</p> <p> Click <Continue> to not select any duties.</p> <p>Note: If you click <Continue>, a dialog box displays. “You have NOT selected any duties for this series.” Click <OK>. A second dialog box displays, “Do you wish to abandon this series for this CD?” Click <Yes> to begin a new series or <No> to return to the Duty List for:.....Window.</p> <p>Click the box next to the Duty Title associated with your series and occupation to display the Duty Classification Levels For:... Window. For Example: Duty Classification Levels For: A Data Entry and Retrieval Window.</p>

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Creating a Core Document, Continued

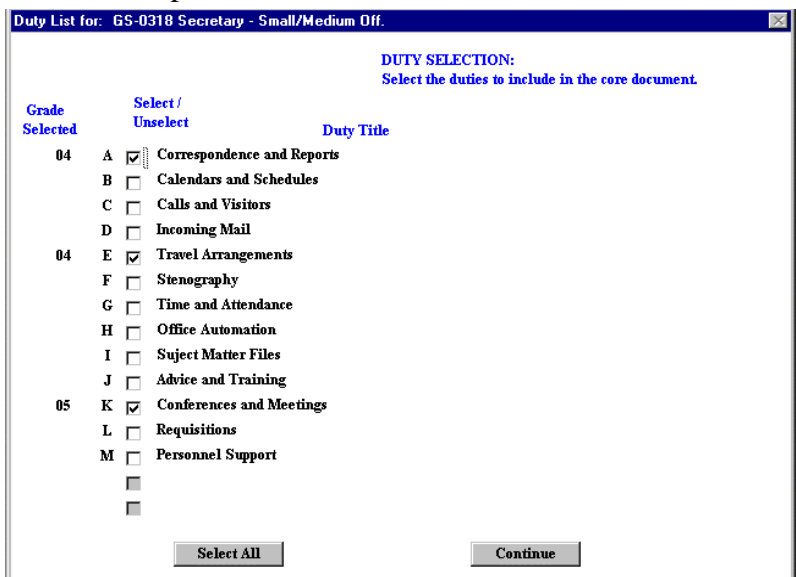
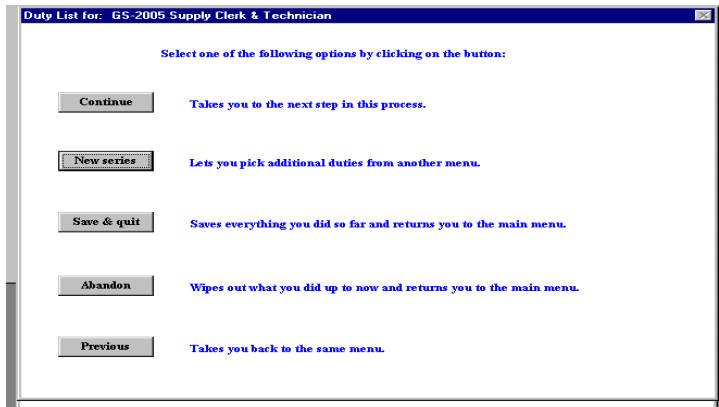
Selecting Duties for a Regular CD (continued)

Step	Action
3	<p>The Duty Classification Levels for: A Data Entry and Retrieval Window displays a description of the first level for the series listing in the Level Selections Area.</p>  <p> Notes:</p> <ul style="list-style-type: none"> Click the Title or Series (i.e., Supply Technician, GS-2005-06) to access the Level/Description for each of the levels. Or Click <Cancel> to return to the Duty List for: Window without making a Duty Level selection.
4	Click the level you need for your CD. The Duty List for: Window returns for selecting additional duties. Select another duty.
5	<p>Click <Statement> to display the Duty Statement Window.</p> 

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Creating a Core Document, Continued

















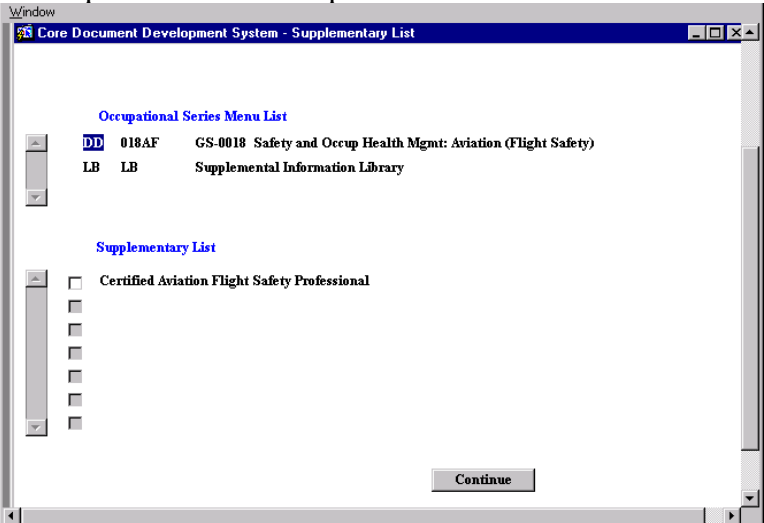
Selecting Duties for a Regular CD (continued)

Step	Action
6	Click < Return > to return to the Level Selection Window. Select the level appropriate for the duty position. The system will return to the Duty Selection Window.
7	<p>After you have selected the last Duty Title, the appropriate Duty List For: Window displays with the Grade Selected Column and checkboxes completed and checked.</p> 
8	<p>Click <Continue> to display the Duty List for: Window.</p> 

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Creating a Core Document, Continued


Selecting Duties for a Regular CD (continued)

Step	Action												
8 (cont)	<p>A description and the use of the buttons follow:</p> <table border="1"> <thead> <tr> <th>Button</th><th>Description/Use</th></tr> </thead> <tbody> <tr> <td></td><td>Proceed to the next creation window.</td></tr> <tr> <td></td><td>Return to the Occupations to Select From Window to select a new series.</td></tr> <tr> <td></td><td>Save your work up to this point and quit.</td></tr> <tr> <td></td><td>Exit your work without saving. A series of dialog boxes display. Click the correct response and return to the Core Document Development Window.</td></tr> <tr> <td></td><td>Return to the Duty List Window.</td></tr> </tbody> </table>	Button	Description/Use		Proceed to the next creation window.		Return to the Occupations to Select From Window to select a new series.		Save your work up to this point and quit.		Exit your work without saving. A series of dialog boxes display. Click the correct response and return to the Core Document Development Window .		Return to the Duty List Window.
Button	Description/Use												
	Proceed to the next creation window.												
	Return to the Occupations to Select From Window to select a new series.												
	Save your work up to this point and quit.												
	Exit your work without saving. A series of dialog boxes display. Click the correct response and return to the Core Document Development Window .												
	Return to the Duty List Window.												
9 	<p>Click <Continue> to proceed. The Core Document Development System - Supplementary List Window displays for selecting additional duties.</p> <p>Note: These duties do not affect the grade or series, but are important to ensure requirements are complete for the CD.</p> 												

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Creating a Core Document, Continued

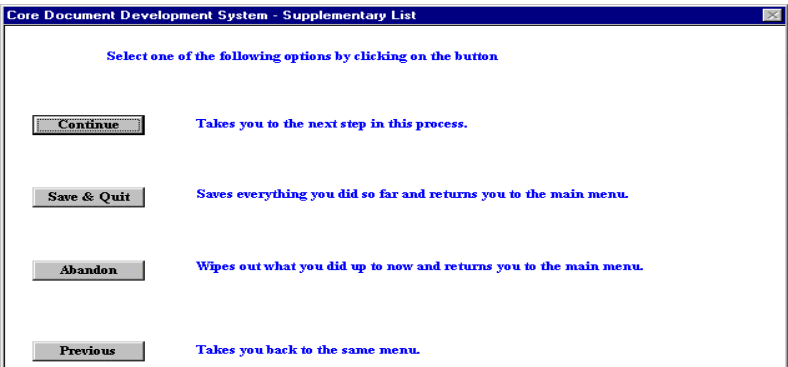

Selecting Supplementary Requirements for a Regular CD

Step	Action
1	<p>Click the Select box to select a level or click <Continue> to return to the Duty List.</p> 
2	<ul style="list-style-type: none"> • Click <Previous> to select additional supplementary duties. • Click <Information> for information about the window.
3	<p>Click <Continue> after you select all the supplementary duties for COREDOC to display another Supplementary List Window.</p> <p><i>OR</i></p> <p>Click <Continue>, even if you did not make any selections.</p>

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Creating a Core Document, Continued

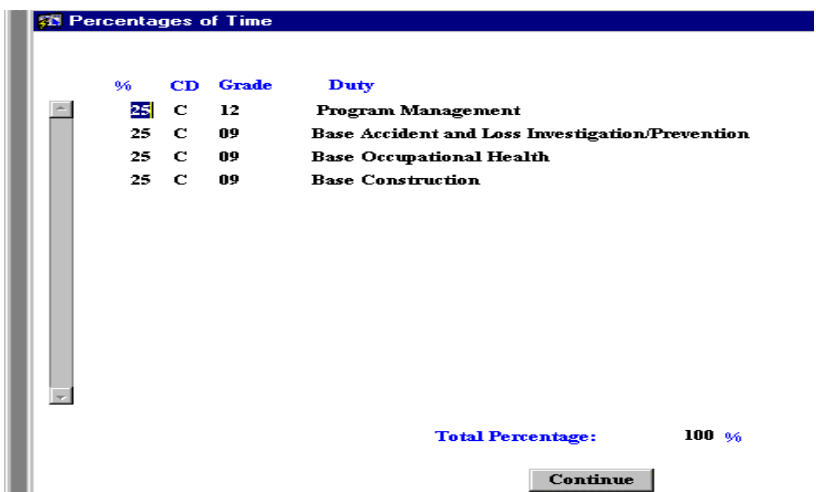
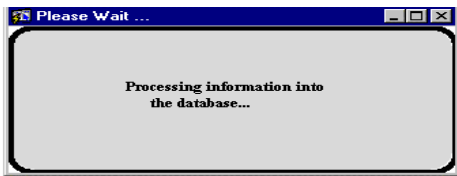
Selecting Supplementary Requirements for a Regular CD (continued)

Step	Action
4	<p>The Core Document Development System – Supplementary List Window displays. Each of the four options is explained in the text. Click the option that meets your needs to continue the COREDOC process.</p>  <p>Core Document Development System - Supplementary List</p> <p>Select one of the following options by clicking on the button</p> <p>Continue Takes you to the next step in this process.</p> <p>Save & Quit Saves everything you did so far and returns you to the main menu.</p> <p>Abandon Wipes out what you did up to now and returns you to the main menu.</p> <p>Previous Takes you back to the same menu.</p>
5	<p>Click <Continue> to display the Percentages of Time Window.</p> <p> Note: If you did not select any of the supplementary duties, a dialog box asks, “Are you finished with Supplementary Information?”</p> <p>Click <YES> to continue creating a CD.</p>

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Creating a Core Document, Continued

Selecting Percentages of Time

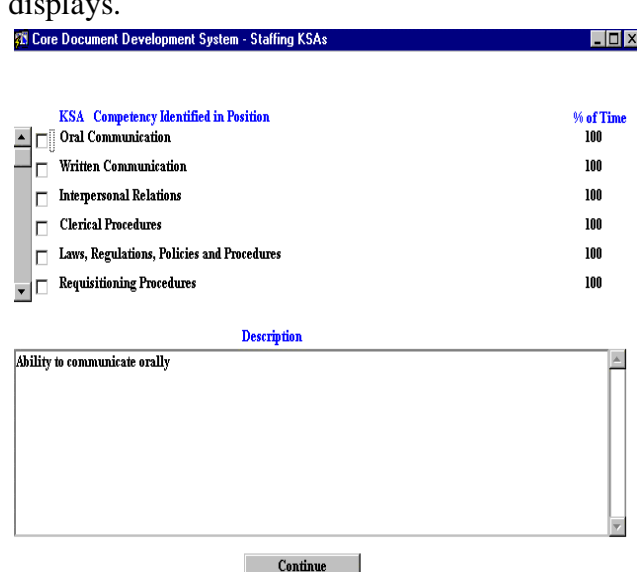

Step	Action
1	<p>The Percentages of Time Window displays with the duties you selected with an assigned percent for each one. COREDOC automatically distributes percentages to equal a total of 100% unless you make adjustments. Total Percentage is displayed at the bottom of the screen and must always equal 100%.</p>  <p>Note: You may change the percentage of time, if needed. Click the box under “%” and type in a new percentage. The total percentage must add up to 100 percent.</p>
2	Click < Continue > to display the Staffing KSAs Window.
3	<p>The Please Wait Dialog Box advises, “Processing information into the database...” before accessing the next step in the COREDOC process.</p> 

Continued on next page

Creating a Core Document, Continued

Selecting Staffing KSAs


All of the competencies listed appear in the CD in the **Basic Training Competencies** Section. Only those you select for staffing, however, will be listed in the selected **Staffing KSAs** section of COREDOC.

Step	Action
1	<p>The Core Document Development System – Staffing KSAs Window displays.</p>  <p>Click the checkbox next to each KSA for the position description. As you select a KSA, the system will take you to the description for that KSA until you have selected all the KSAs that you need. The KSAs will populate in the <i>Description</i> field.</p> <p> Notes:</p> <ul style="list-style-type: none"> • The KSA Checkboxes will usually be blank. If there are check marks in them, a pre-determination has been made that the KSAs are essential to both staffing and training. • Numbers in the % of Time Column indicate the percentage of work requiring the particular competency (KSA). • If the competency applies to all KSAs selected, then the percentage is 100. If the competency applies to only one duty and that duty comprises 30% of the job, then the % of time will be 30.0. The % of Time Column displays to assist in deciding which KSAs to select for staffing.
2	Click < Continue > to display the Title, Pay Plan, Series, Grade Window after you have selected all the KSAs you need for the CD.

Continued on next page

Creating a Core Document, Continued

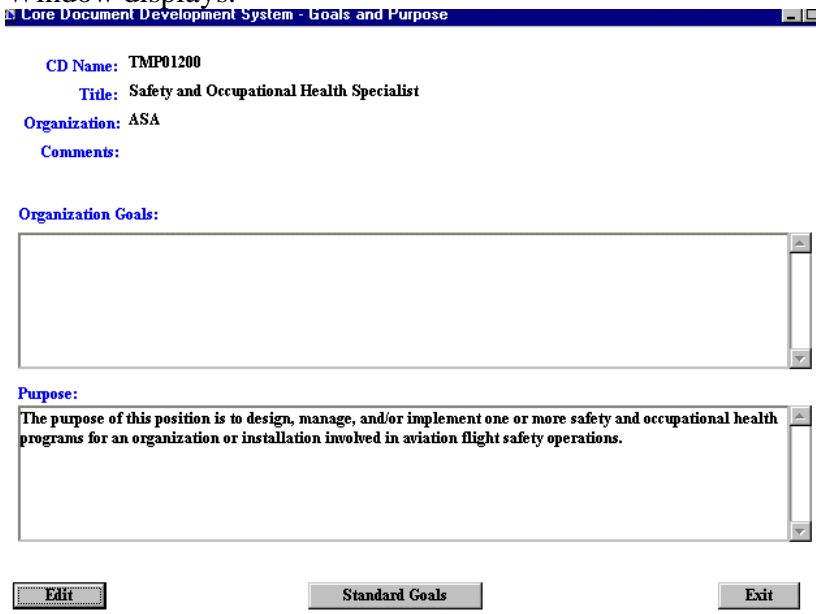
Verifying Title, Pay Plan, Series, and Grade for a Regular CD

Step	Action
1	<p>The Core Document Development System – Title, Pay Plan, Series, Grade Window displays. The Window contains the CD Name, Official Title, Series, Pay Plan, and Grade data fields. These are automatically populated based on your previous selections in the creation process.</p>  <ul style="list-style-type: none"> • Click <Edit> and highlight selection to change the Official Title, Series, or Pay Plan. Any changes made on this window will be reflected in the Classification Summary of the CD. CD Name cannot be changed. • Click Title to make any changes to the Official Title. • Click <Continue> to go to the next step and display the Goals and Purpose Window.

Continued on next page

Creating a Core Document, Continued

Completing the Organizational Goals And Purpose for a Regular CD

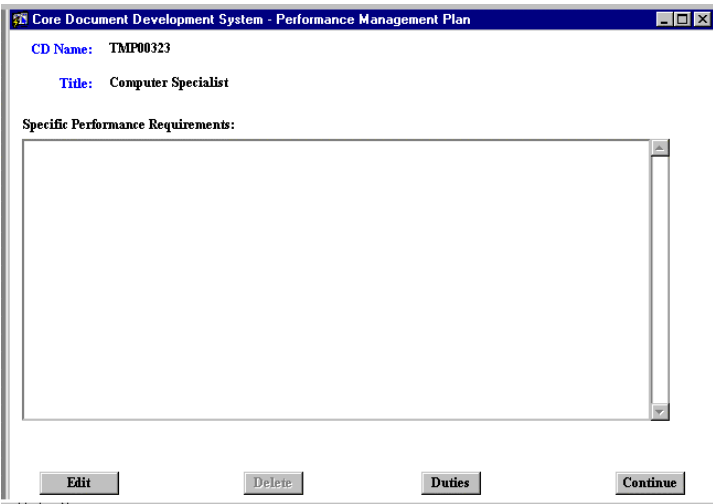
Step	Action									
1	<p>The Core Document Development System – Goals and Purpose Window displays.</p> 									
2	<table><tr><th>If you</th><th>Then</th></tr><tr><td>Choose to write your own Organizational Goals and Purpose.</td><td>Click <Edit> and type them in the fields provided. Click Save. Click <Exit> The Performance Management Plan Window will display.</td></tr><tr><td>Choose to use Standards Goals. (Note: Users with “Classifier” or “Super User” role can establish “Standard Goals” as a default for the organizations serviced.)</td><td>Click <Standard Goals> for auto population. Click <Exit>. The Performance Management Plan Window will display.</td></tr><tr><td>Choose not to input Goals and Purpose.</td><td>Click <Exit>. The Performance Management Plan Window will display.</td></tr></table>	If you	Then	Choose to write your own Organizational Goals and Purpose.	Click < Edit > and type them in the fields provided. Click Save . Click < Exit > The Performance Management Plan Window will display.	Choose to use Standards Goals. (Note: Users with “Classifier” or “Super User” role can establish “Standard Goals” as a default for the organizations serviced.)	Click < Standard Goals > for auto population. Click < Exit >. The Performance Management Plan Window will display.	Choose not to input Goals and Purpose.	Click < Exit >. The Performance Management Plan Window will display.	
If you	Then									
Choose to write your own Organizational Goals and Purpose.	Click < Edit > and type them in the fields provided. Click Save . Click < Exit > The Performance Management Plan Window will display.									
Choose to use Standards Goals. (Note: Users with “Classifier” or “Super User” role can establish “Standard Goals” as a default for the organizations serviced.)	Click < Standard Goals > for auto population. Click < Exit >. The Performance Management Plan Window will display.									
Choose not to input Goals and Purpose.	Click < Exit >. The Performance Management Plan Window will display.									

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Creating a Core Document, Continued

Developing the Performance Management Plan for a Regular CD

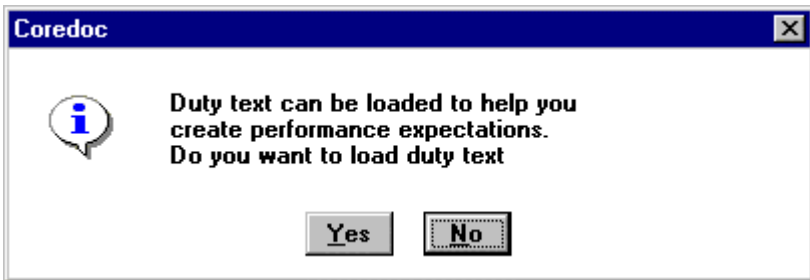
COREDOC is programmed to reconfigure the duties selected into objectives for use in the **Performance Management Plan** Window. It will format the duty statements (objectives) to emulate your component's current performance management plan. The window is essentially the same for each Component; however, the output will be different depending on your Component. For example, Air Force does not use this part of COREDOC. Follow these steps to develop the Performance Management Plan:

Step	Action
1	<p>The Core Document Development System – Performance Management Plan Window displays.</p>  <p>There are four Taskflow Buttons on the window. The descriptions of the buttons follow.</p> <ul style="list-style-type: none"> <Edit> - Add or change text to comply with your Component's governing performance elements and standards. <Delete> - Remove text from the document. <Duties> - Load duty statements associated with the CD. <Continue> - Continue the creation process. <p>Click <Duties> to display the Core Document Development Window.</p>

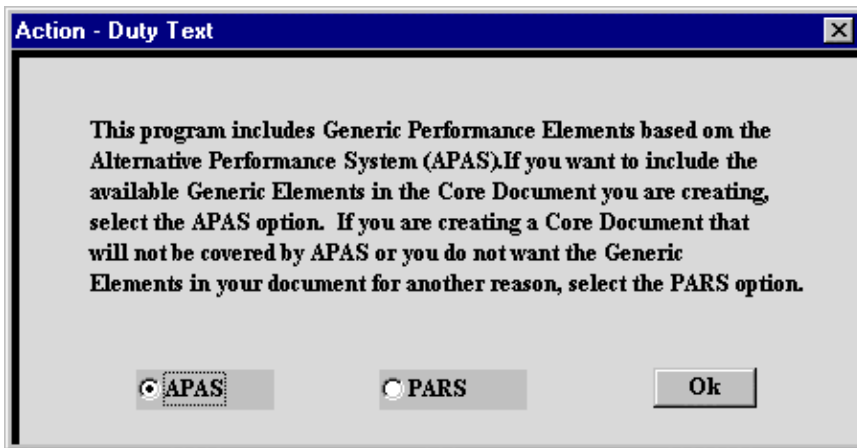
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Creating a Core Document, Continued

Developing the Performance Management Plan for a Regular CD (continued)

Step	Action		
2	A Duty Text Dialogue Box displays:		
			
3	Click <Yes> if you	Click <No> if you	
	Want the system to load performance requirements.	Want to enter your own performance requirements.	

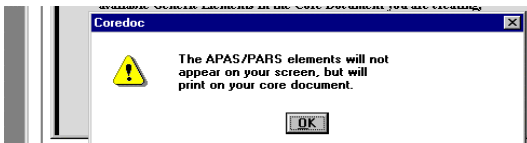
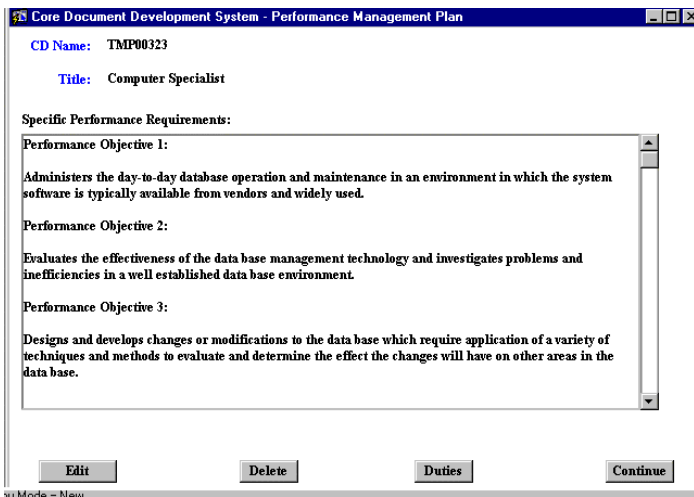
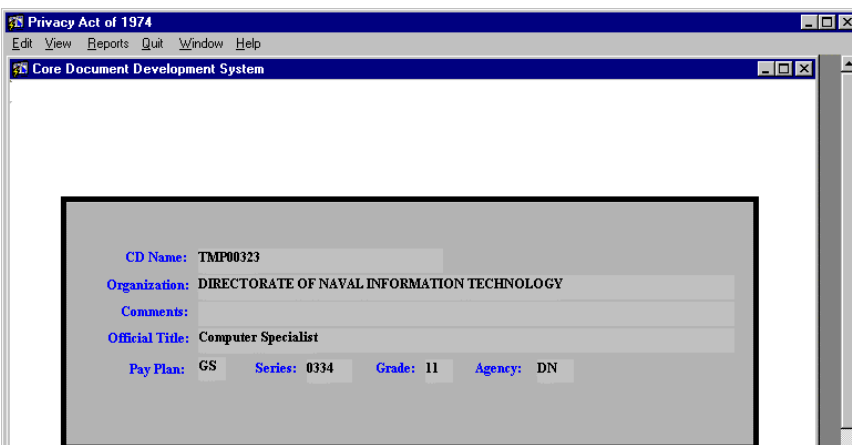
Using the System-Generated Performance Requirements

Step	Action
1	<p>If you click <Yes>, a Duty Text Dialogue Box displays.</p> 

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Creating a Core Document, Continued

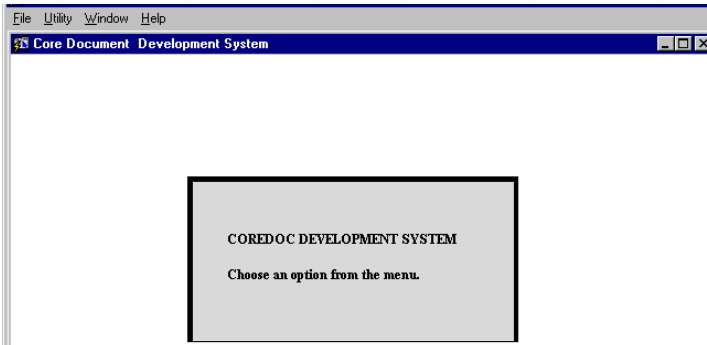
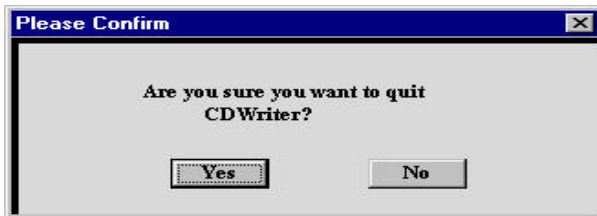
Using the System-Generated Performance Requirements (continued)

Step	Action
2	<p>Click <OK>. A notice displays.</p> 
3	<p>Click <OK>.</p> 
4	<p>Click <Continue>. The Core Document Development System - Performance Management Plan Window displays. This window provides the <i>CD Name</i>, <i>Organization</i>, <i>Comments</i>, <i>Official Title</i>, <i>Pay Plan</i>, <i>Series</i>, <i>Grade</i>, and <i>Agency</i> fields with your input.</p> 

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Creating a Core Document, Continued

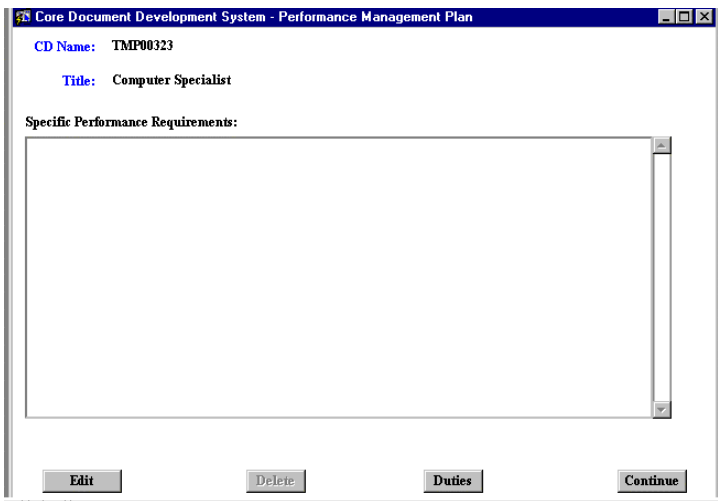
Using the System-Generated Performance Requirements (continued)

Step	Action
5	Click <Edit>. Click Exit .
6	<p>The Core Document Development System Window displays.</p> 
7	Click File . Click Exit .
8	<p>The Please Confirm Window will display the question “Are you sure you want to Quit CD Writer?”</p> 
9	Click <Yes> to exit.

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Creating a Core Document, Continued

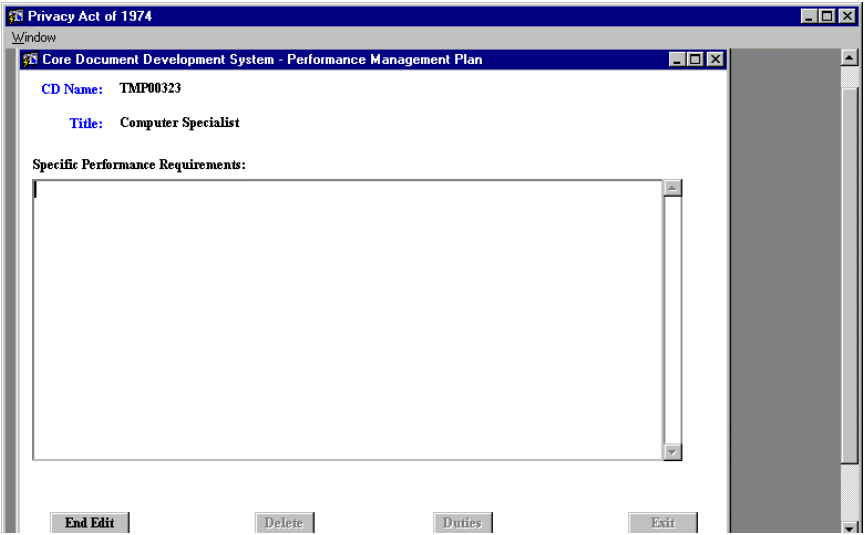
Entering New Performance Requirements

Step	Action
1	<p>If you clicked <No> in Step 3 of Developing the Performance Management Plan above, the Core Document Development System - Performance Management Plan Window displays with the Specific Performance Requirements Section blank.</p>  <p>Click <Edit>.</p>

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Creating a Core Document, Continued

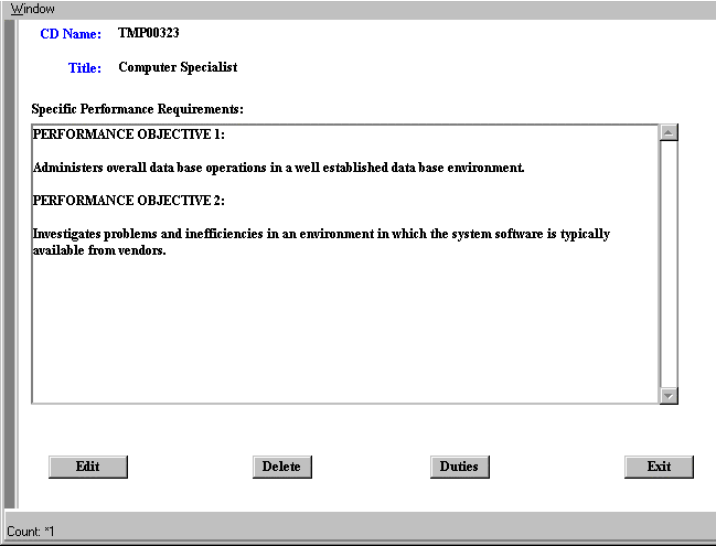
Entering New Performance Requirements (continued)

Step	Action
2	<p>The Core Document Development System - Performance Management Plan Window displays with Specific Performance Requirements blank.</p>  <p>Type the specific performance requirements. Click <End Edit>.</p>

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Creating a Core Document, Continued

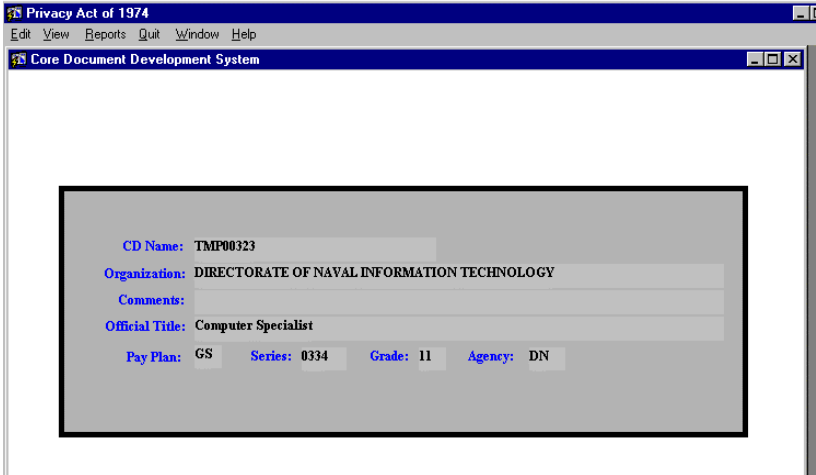
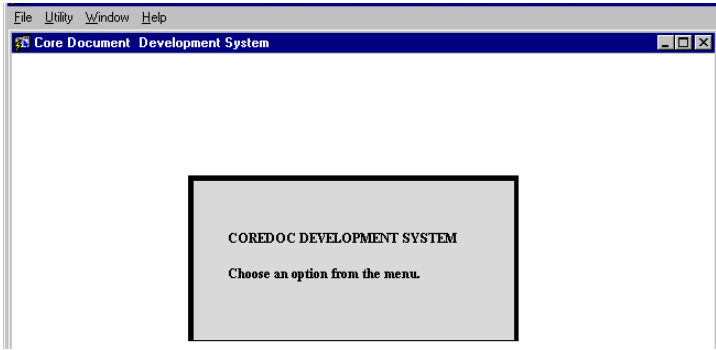
Entering New Performance Requirements (continued)

Step	Action
3	<p>The Core Document Development System - Performance Management Plan Window displays with your input.</p> 
4	Click <Exit> .

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Creating a Core Document, Continued

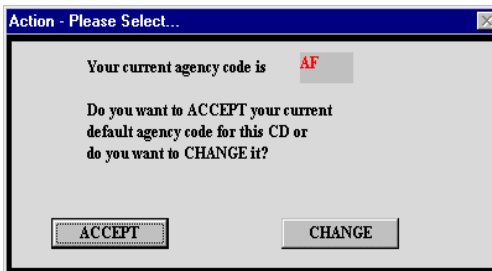
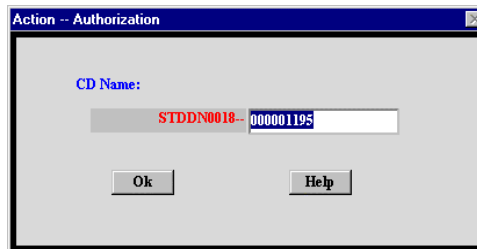
Entering New Performance Requirements (continued)

Step	Action
5	<p>The Core Document Development System Window displays. This window provides the <i>CD Name</i>, <i>Organization</i>, <i>Comments</i>, <i>Official Title</i>, <i>Pay Plan</i>, <i>Series</i>, <i>Grade</i>, and <i>Agency</i> fields with your input.</p> 
6	Click E dit. Click E xit.
7	<p>The Core Document Development System Window displays.</p> 
8	Click F ile. Click E xit to exit COREDOC.

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Creating a Core Document, Continued

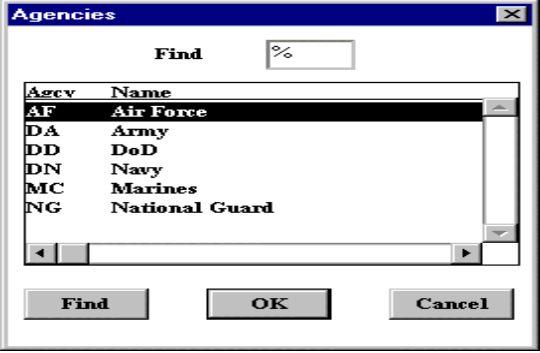
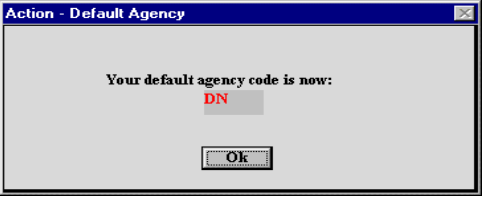
Creating a Standard CD

Step	Action	
1	<p>The Action – Please Select Window displays with two Taskflow Buttons and the statement “Your current agency code is _____. Do you want to accept your current default agency code for this CD or do you want to CHANGE it?”</p> 	
2	<p>If you click</p> <p><Accept></p>	<p>Then</p> <p>The Action – Authorizations Window displays and the system defaults to the agency code shown on the window. Two buttons are on the bottom of the screen:</p> <p><OK> - Displays the Duty List For: (Pay Plan, Series, Job Title) Window in the block titled “Selecting from the Duty List”.</p> <p><Help> - takes you to the COREDOC Help System Window on Standard CDs shown in this decision-logic table.</p> 

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Creating a Core Document, Continued

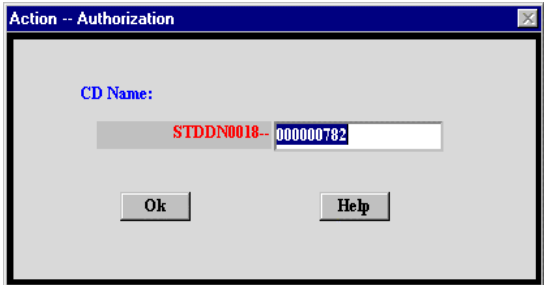
Creating a Standard CD (continued)

Step	Action	
2 (cont)	If you click	Then
	<p data-bbox="574 512 719 543"><Change></p> <p data-bbox="574 995 740 1136">your Agency and Name and click <OK></p>	<p data-bbox="761 512 1305 579">The Agencies Window displays with three Taskflow Buttons used in all queries.</p>  <p data-bbox="761 995 1390 1100">The Action – Default Agency Window displays with your Component listed in the default agency field.</p> 

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Creating a Core Document, Continued

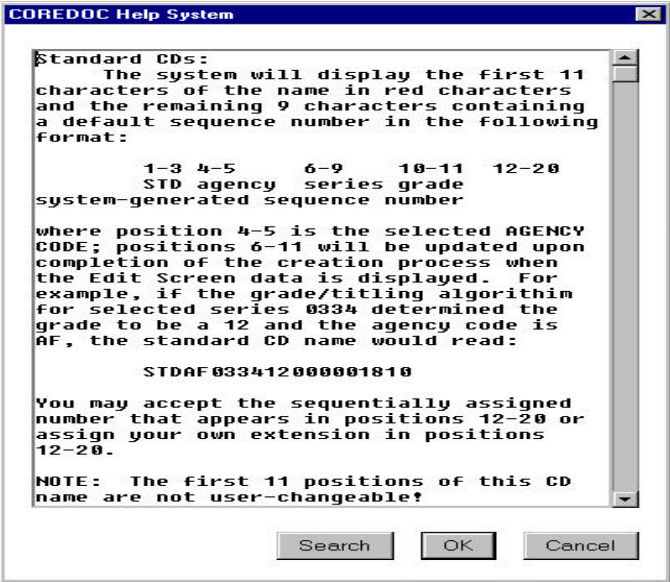
Creating a Standard CD (continued)

Step	Action	
	If you click	Then
2 (cont)	<Ok>	<p>The Action – Authorization Window displays with the <i>CD Name</i> field auto populated. Two buttons are on the bottom of the window:</p> <p><Ok> - Displays the Core Document Development System Window.</p> <p><Help> - Displays the COREDOC Help System Window on Standard CDs shown in the next step.</p>
		

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Creating a Core Document, Continued

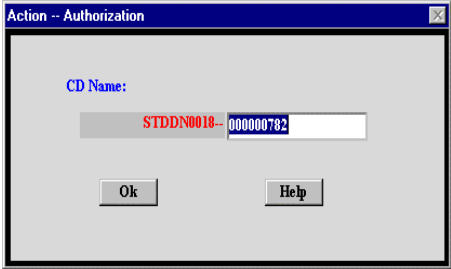
Creating a Standard CD (continued)

Step	Action	
2 (cont)	If you click	Then
	<Help>	<p>The COREDOC Help System Window displays with the sequentially assigned number. Three buttons are located on the window:</p> <p><Search> - Displays the Search/Replace Window to make changes and give you an explanation of the characters that constitute the Standard CD.</p> <p><OK> - Displays the next window.</p> <p><Cancel>- Returns you to the previous window.</p> 

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Creating a Core Document, Continued

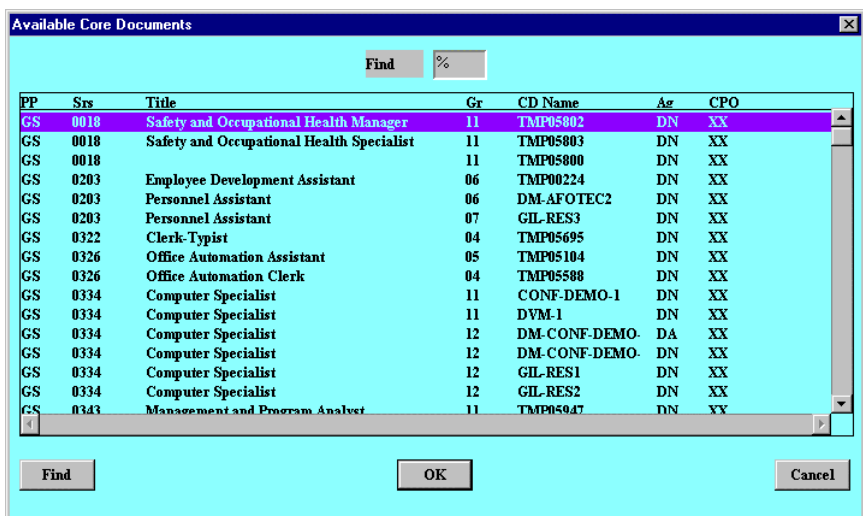
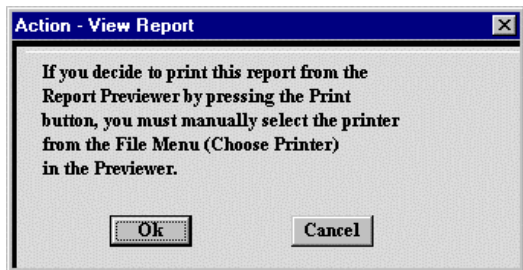
Creating a Standard CD (continued)

Step	Action	
	If you click	Then
2 (cont)	<Cancel>	You are returned to the Action – Authorization Window. Click <Ok> and continue with the Standard CD.
		

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Creating a Core Document, Continued

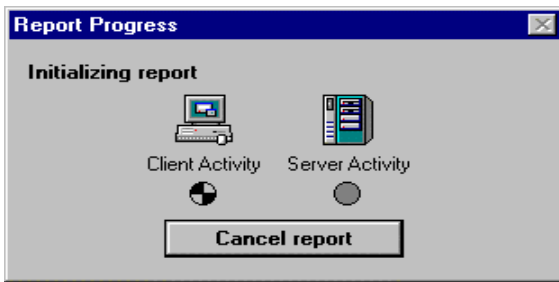
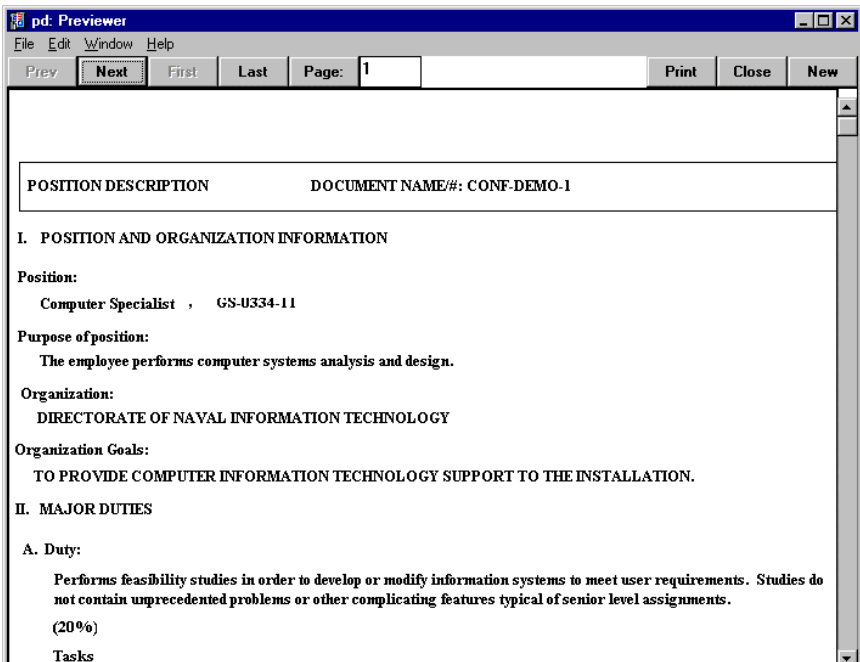

Viewing and Printing a CD

Step	Action
1	Click File and then click View on the Main Menu Bar.
2	<p>The Available Core Documents Window displays</p> 
3	Select the CD you wish to preview.
4	Click <OK> .
5	<p>The Action – View Report Dialog Box displays with the statement, “If you decide to print this report from the Report Previewer by pressing the Print button, you must manually select the printer from the File Menu (Choose Printer) in the Previewer.”</p> <p>Click <Ok>.</p> 

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Creating a Core Document, Continued

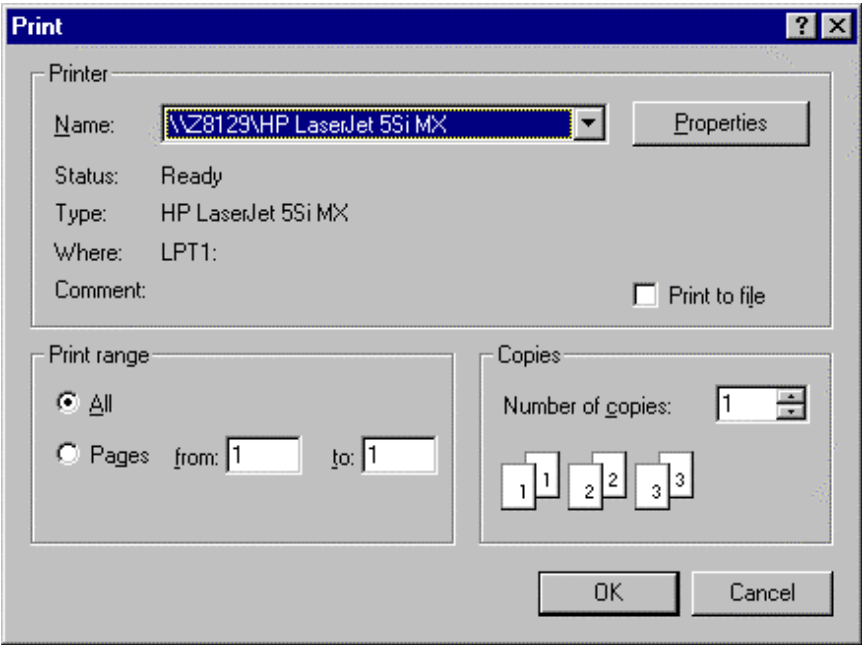
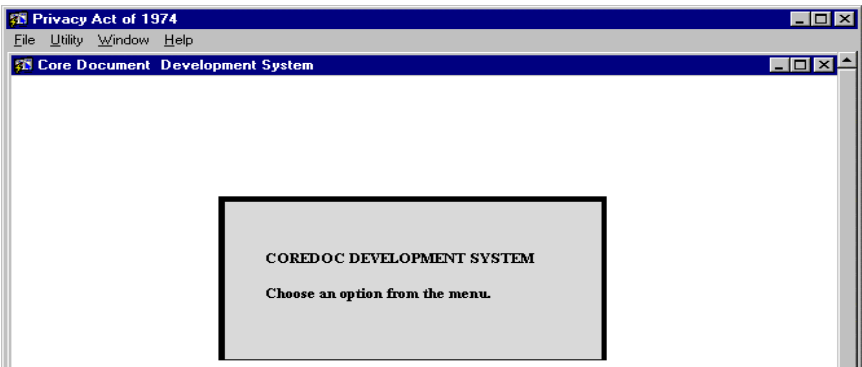
Viewing and Printing a CD (continued)

Step	Action
6	<p>The Report Progress Dialog Box displays informing you that the activity is processing.</p>  <p>The dialog box titled "Report Progress" shows "Initializing report". It contains two progress indicators: "Client Activity" (a pie chart) and "Server Activity" (a circle). A "Cancel report" button is at the bottom.</p>
7	<p>The pd: Previewer Window displays with a menu bar, eight buttons, a page indicator, and a scroll bar.</p>  <p>The previewer window shows a document titled "CONF-DEMO-1". The content includes:</p> <p>POSITION DESCRIPTION DOCUMENT NAME/ #: CONF-DEMO-1</p> <p>I. POSITION AND ORGANIZATION INFORMATION</p> <p>Position: Computer Specialist , GS-U334-11</p> <p>Purpose of position: The employee performs computer systems analysis and design.</p> <p>Organization: DIRECTORATE OF NAVAL INFORMATION TECHNOLOGY</p> <p>Organization Goals: TO PROVIDE COMPUTER INFORMATION TECHNOLOGY SUPPORT TO THE INSTALLATION.</p> <p>II. MAJOR DUTIES</p> <p>A. Duty: Performs feasibility studies in order to develop or modify information systems to meet user requirements. Studies do not contain unprecedented problems or other complicating features typical of senior level assignments. (20%)</p> <p>Tasks</p> <p> Note: You can preview the first page of the CD by using the scroll bar on the side. If you want to preview the rest of the CD, click <Next> until you get to the last page.</p>

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Creating a Core Document, Continued

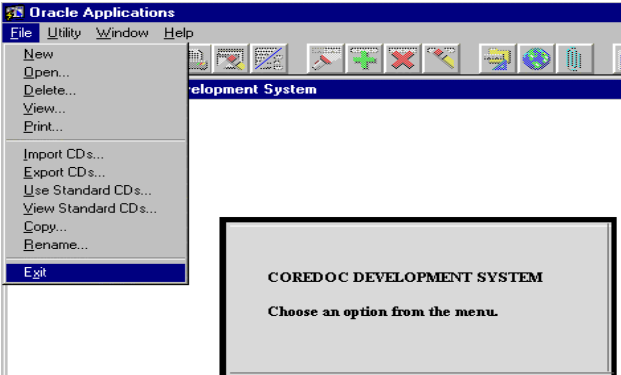
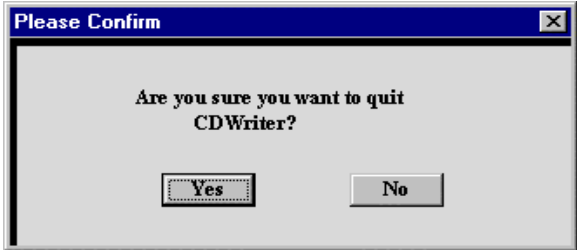
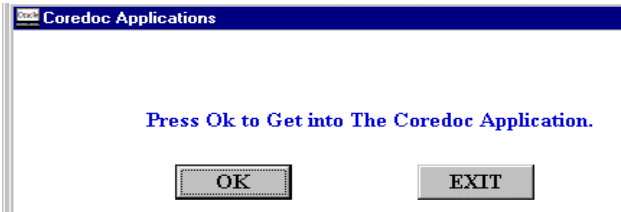
Viewing and Printing a CD (continued)

Step	Action
8	<p>Click File. Click Print. The Print Window displays.</p> 
9	<p>Select the appropriate printer in Printer <i>Name</i> data field. Select the Print Range and number of copies needed. Click <OK> to print the number of copies needed.</p>
10	<p>Click <Close> to return to the Core Document Development System Window.</p> 

Continued on next page

Creating a Core Document, Continued

Exiting COREDOC

Step	Action
1	<p>Click Edit on the Main Menu Bar.</p> <p>The COREDOC DEVELOPMENT SYSTEM Dialog box displays with a new Toolbar.</p> <p>Click File and click Exit from the drop down menu.</p> 
2	<p>The <i>Please Confirm</i> Dialog Box displays asking, “Are you sure you want to quit CD Writer?”</p> <p>Click <Yes>.</p> 
3	<p>The Coredoc Applications Window displays.</p>  <p>Click <EXIT>.</p>
4	The Navigator Window displays.


Viewing and Printing an Existing Core Document

Purpose This section explains how to access **COREDOC** to view and print an existing CD.

Section Contents

- Accessing COREDOC
- Viewing a CD
- Printing a CD

See Also In this Chapter:

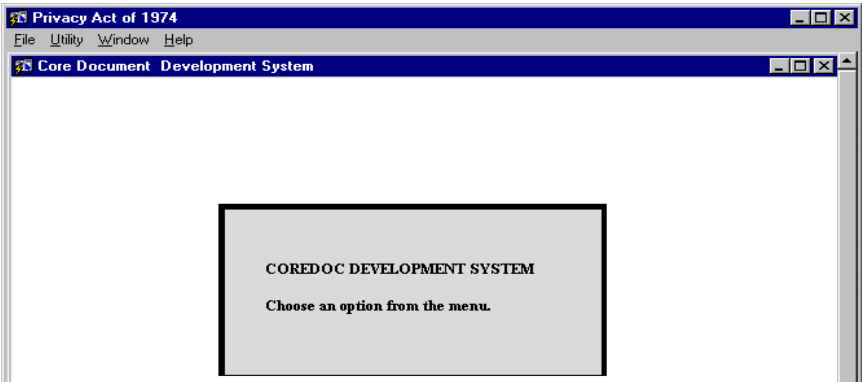


- Accessing and Navigating in COREDOC
- Creating a Core Document

Accessing COREDOC

Step	Action
1	From the Responsibilities Window, click your assigned Responsibility → <OK>.
2	The Navigator List displays. Click <i>Coredoc</i> → <Open>.

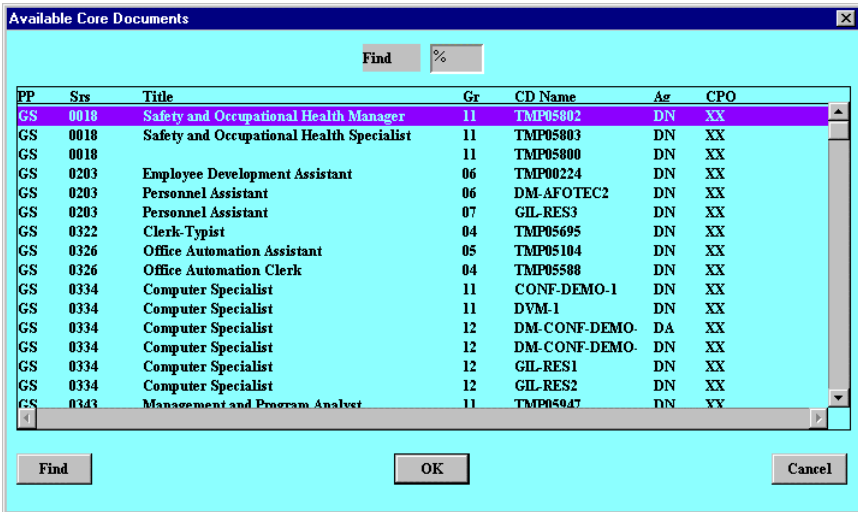
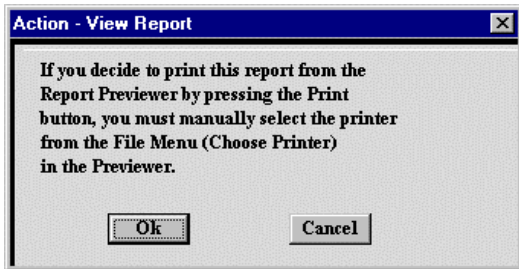
Viewing a CD

Step	Action
1	<p>The Core Document Development System Window displays.</p> 
2	Click F ile and then click V iew on the Main Menu Bar.

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Viewing and Printing an Existing Core Document, Continued

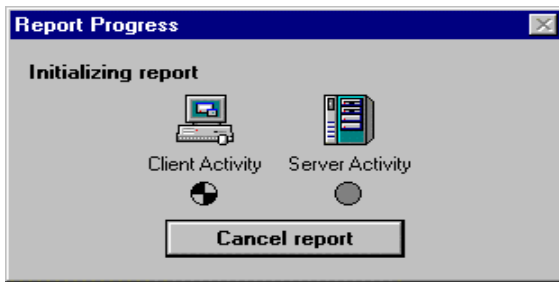
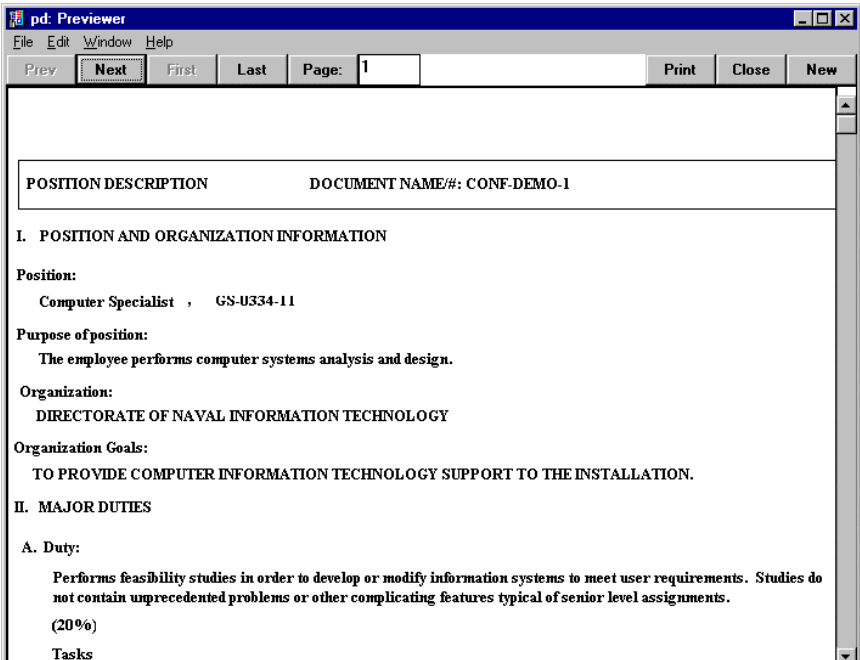
Viewing a CD (continued)

Step	Action																																																																																																																							
3	<p>The Available Core Documents Window displays. Select the CD you wish to preview.</p>  <p>The screenshot shows a window titled 'Available Core Documents'. At the top is a search bar with a 'Find' button and a text input field containing '%'. Below is a table with the following data:</p> <table><tr><th>PP</th><th>Srs</th><th>Title</th><th>Gr</th><th>CD Name</th><th>Asr</th><th>CPO</th></tr><tr><td>GS</td><td>0018</td><td>Safety and Occupational Health Manager</td><td>11</td><td>TMP05802</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0018</td><td>Safety and Occupational Health Specialist</td><td>11</td><td>TMP05803</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0018</td><td></td><td>11</td><td>TMP05800</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0203</td><td>Employee Development Assistant</td><td>06</td><td>TMP00224</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0203</td><td>Personnel Assistant</td><td>06</td><td>DM-AFOTEC2</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0203</td><td>Personnel Assistant</td><td>07</td><td>GIL-RES3</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0322</td><td>Clerk-Typist</td><td>04</td><td>TMP05695</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0326</td><td>Office Automation Assistant</td><td>05</td><td>TMP05104</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0326</td><td>Office Automation Clerk</td><td>04</td><td>TMP05588</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0334</td><td>Computer Specialist</td><td>11</td><td>CONF-DEMO-1</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0334</td><td>Computer Specialist</td><td>11</td><td>DVM-1</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0334</td><td>Computer Specialist</td><td>12</td><td>DM-CONF-DEMO</td><td>DA</td><td>XX</td></tr><tr><td>GS</td><td>0334</td><td>Computer Specialist</td><td>12</td><td>DM-CONF-DEMO</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0334</td><td>Computer Specialist</td><td>12</td><td>GIL-RES1</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0334</td><td>Computer Specialist</td><td>12</td><td>GIL-RES2</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0343</td><td>Management and Program Analyst</td><td>11</td><td>TMP05947</td><td>DN</td><td>XY</td></tr></table> <p>At the bottom of the window are three buttons: 'Find', 'OK', and 'Cancel'.</p>	PP	Srs	Title	Gr	CD Name	Asr	CPO	GS	0018	Safety and Occupational Health Manager	11	TMP05802	DN	XX	GS	0018	Safety and Occupational Health Specialist	11	TMP05803	DN	XX	GS	0018		11	TMP05800	DN	XX	GS	0203	Employee Development Assistant	06	TMP00224	DN	XX	GS	0203	Personnel Assistant	06	DM-AFOTEC2	DN	XX	GS	0203	Personnel Assistant	07	GIL-RES3	DN	XX	GS	0322	Clerk-Typist	04	TMP05695	DN	XX	GS	0326	Office Automation Assistant	05	TMP05104	DN	XX	GS	0326	Office Automation Clerk	04	TMP05588	DN	XX	GS	0334	Computer Specialist	11	CONF-DEMO-1	DN	XX	GS	0334	Computer Specialist	11	DVM-1	DN	XX	GS	0334	Computer Specialist	12	DM-CONF-DEMO	DA	XX	GS	0334	Computer Specialist	12	DM-CONF-DEMO	DN	XX	GS	0334	Computer Specialist	12	GIL-RES1	DN	XX	GS	0334	Computer Specialist	12	GIL-RES2	DN	XX	GS	0343	Management and Program Analyst	11	TMP05947	DN	XY
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4	Click <OK> .																																																																																																																							
5	<p>The Action – View Report Dialog Box displays with the statement, “If you decide to print this report from the Report Previewer by pressing the Print button, you must manually select the printer from the File Menu (Choose Printer) in the Previewer.”</p> <p>Click <Ok>.</p>  <p>The screenshot shows a dialog box titled 'Action - View Report'. The text inside reads: 'If you decide to print this report from the Report Previewer by pressing the Print button, you must manually select the printer from the File Menu (Choose Printer) in the Previewer.' At the bottom are 'Ok' and 'Cancel' buttons.</p>																																																																																																																							

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Viewing and Printing an Existing Core Document, Continued

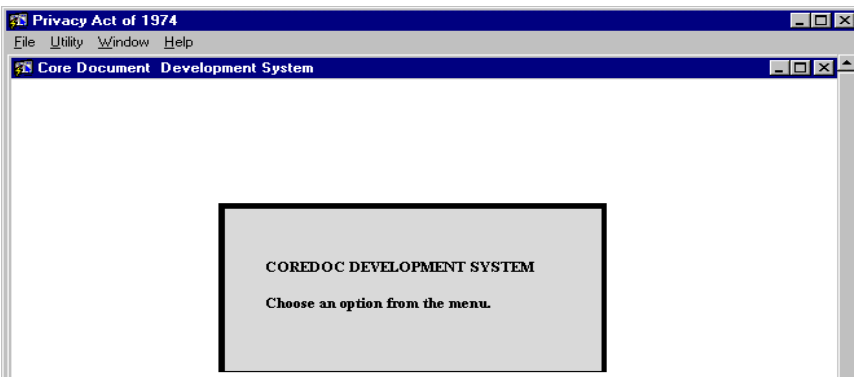
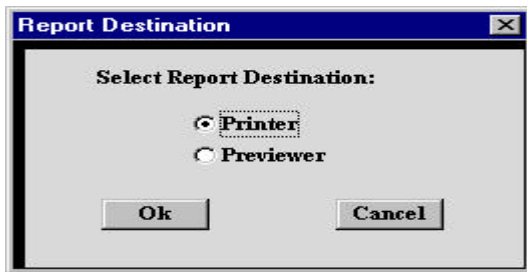
Viewing a CD (continued)

Step	Action
6	<p>The Report Progress Dialog Box displays informing you that the activity is processing.</p>  <p>The dialog box titled "Report Progress" shows "Initializing report". It contains two progress indicators: "Client Activity" (a pie chart) and "Server Activity" (a circle). A "Cancel report" button is at the bottom.</p>
7	<p>The pd: Previewer Window displays with a menu bar, eight Taskflow Button, a page indicator, and a scroll bar.</p>  <p>The previewer window shows a document titled "CONF-DEMO-1". The content includes sections for "POSITION AND ORGANIZATION INFORMATION" and "MAJOR DUTIES".</p> <p>Note: You can preview the first page of the CD by using the scroll bar on the side. If you want to preview the rest of the CD, click <Next> until you get to the last page.</p>

Continued on next page

Viewing and Printing an Existing Core Document, Continued

Printing a CD

Step	Action
1	<p>Click <Close> to return to the Core Document Development System Window.</p> 
2	Follow Steps 3 and 4 in Viewing a CD.
3	<p>The Report Destination Window displays. Select Printer to print the CD. Click <OK>.</p> 
4	Follow Steps 5 and 6 in Viewing a CD.
5	The CD prints to your default printer.
6	The COREDOC Development System Window displays.
7	Click F ile, and click E xit to return to the Navigator Window .

Continued on next page

Modifying a Core Document

Purpose

After you generate a core document (CD), you have the option to edit and modify the document. This section explains how to modify an existing CD.

Section Contents

- Retrieving an Existing CD
- Opening a CD
- Edit Menu
- Editing and Modifying:
 - Goals and Purpose
 - Major Duties
 - Percentages of Assigned Duties
 - Knowledge Factors
 - Other Factors
 - KSAs
 - Staffing KSAs
 - Other Work Requirements
 - Performance Management Plan
 - Title/Pay Plan/Series
 - Cover Sheet
 - Classification Remarks
- Adding More Occupations
- Adding the Classification Summary

See Also



Section on Creating a Core Document in this Module.

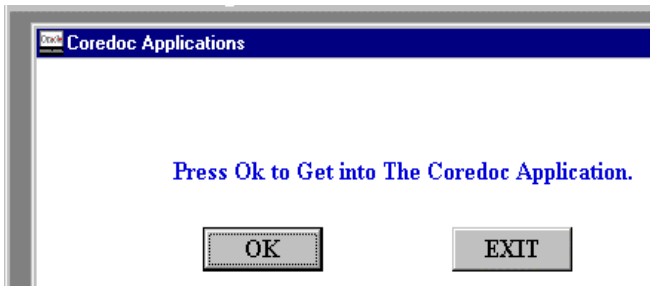
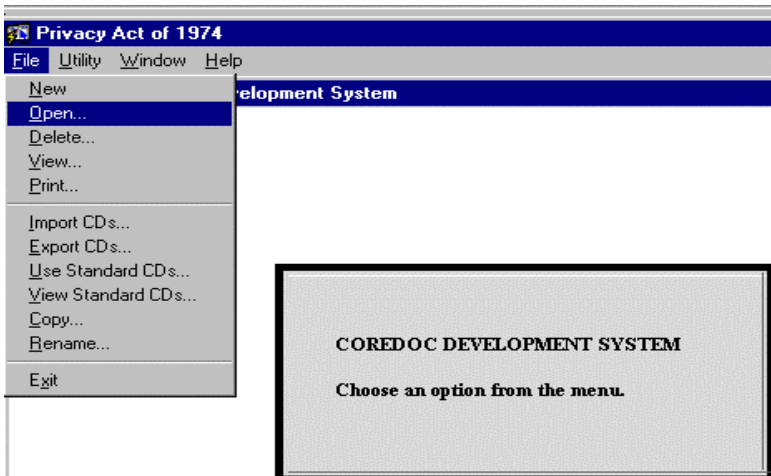
Before You Begin

- The options on the Toolbar and drop-down menus are defined in the Overview section of this module.
- The **Help** option is available on the Main Menu Bar and includes the two drop-down choices:
 - **Help System** provides general information about the purpose and general functionality in COREDOC.
 - **Show Key** provides information on using convention keystrokes.
- You must be in the Role of Classifier or Super User to modify the Cover Sheet.

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Modifying a Core Document, Continued

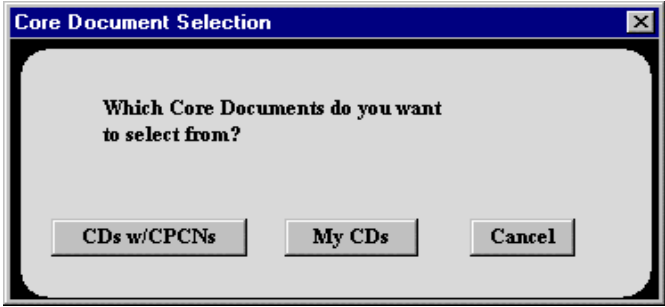

Retrieving an Existing CD

Step	Action
1	On the Navigation List → Coredoc → <Open> .
2	<p>The Coredoc Applications Window displays. Click <OK>.</p> 
3	<p>The Core Document Development System Window displays. Click File. From the drop-down menu, click Open.</p> 

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Modifying a Core Document, Continued

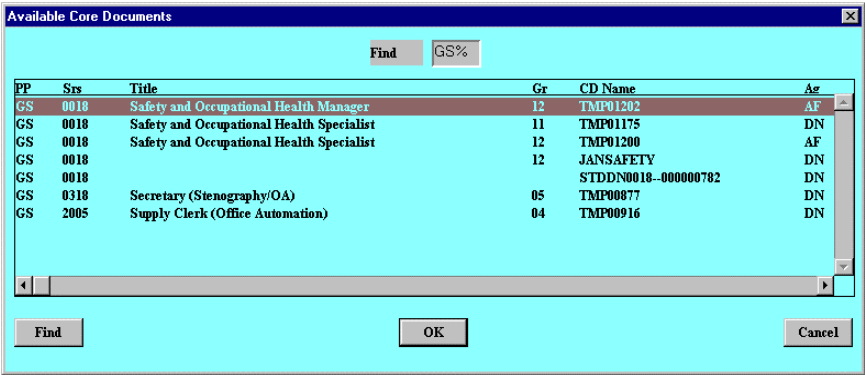
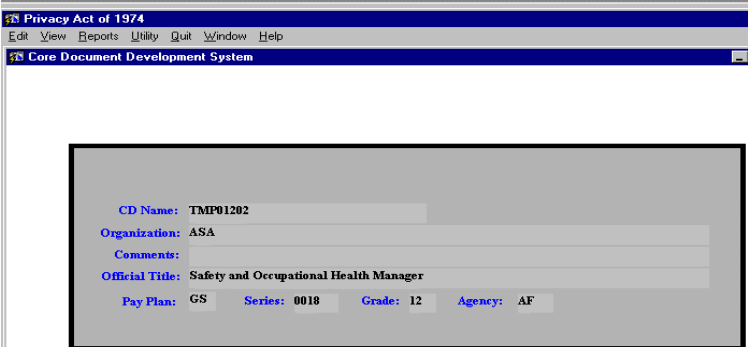

Opening a CD

Step	Action
1	<p>The Core Document Selection Window displays. There are two Taskflow Buttons to use in editing a CD.</p>  <p><CDs w/CPCNs> - Displays the Available Core Document Window which contains CDs with CPCNs already assigned.</p> <p><My CDs> - Displays the Available Core Documents Window which contains a listing of CDs you have generated. (They are not activated until you link them with an RPA.)</p> <p><Cancel> - Returns to the Core Document Main Menu.</p> <p> Note: If you previously created CDs but did not link one to an RPA, this window will be by-passed and will take you to the Available Core Documents Window in step 2.</p> <p>Click <My CDs>. (This is used for illustration purposes only.)</p>

Continued on next page

Modifying a Core Document, Continued

Opening a CD (continued)

Step	Action
2	<p>The Available Core Documents Window displays a listing of Core Documents, which includes <i>PP</i>, <i>Series</i>, <i>Title</i>, <i>Grade</i>, <i>CD Name</i>, <i>Agency</i>, and <i>CPO</i>.</p> <p>Click the CD you need to modify and click <OK>.</p> 
3	<p>The Core Document Development System Window displays. Click <u>E</u>dit.</p>  <p> Note: You can modify most data fields in a CD, except those determined by your Component's business rules.</p>

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Modifying a Core Document, Continued

Edit Menu

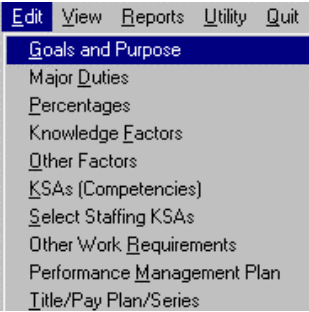

The Edit Menu contains 15 options to use in modifying a CD:

Menu Item	Function/Description
<u>G</u>oals and Purpose	Use to change the Organizational Goals and Purpose.
Major <u>D</u>uties	Use to modify duties and tasks.
<u>P</u>ercentages	Use to change the percentages of time assigned.
<u>K</u>nowledge <u>F</u>actors	Use to edit the classification Knowledge factors.
<u>O</u>ther Factors	Use to edit other classification factors.
<u>K</u>SAs (Competencies)	Use to add, delete, or modify the Basic KSAs.
<u>S</u>elect Staffing KSAs	Use to select or deselect previously selected staffing (requirement) KSAs.
<u>O</u>ther Work <u>R</u>equirements	Use to modify, add, or delete supplementary duties and responsibilities.
<u>P</u>erformance <u>M</u>anagement Plan	Use to add, delete, or modify performance elements and standards.
<u>T</u>itle/Pay Plan/Series	Use to change title series, and/or pay plan.
<u>C</u>over Sheet	Used by supervisors and managers to complete and sign a cover sheet. The <i>Cover Sheet</i> option activates under the Edit and Reports toolbar menus when a CD has been attached to an RPA.
<u>C</u>lassification <u>R</u>emarks	Use to add remarks to the summary information.
<u>M</u>ore <u>O</u>ccupations	Use to add duties from a different Occupational series.
<u>C</u>lassification <u>S</u>ummary	Use to view the classification summary.
<u>E</u>xit	Use to exit and return to the Main Coredoc Window.

Continued on next page

Modifying a Core Document, Continued


Modifying Goals and Purpose

Step	Action
1	<p>Click Goals and Purpose.</p> 
	<p>The Core Document Development System – Goals and Purpose Window displays.</p>  <p>There are three Taskflow Buttons:</p> <ul style="list-style-type: none"> • <Edit> - Allows you to modify the goals and purposes. <p>Note: When you click <Edit>, the <Exit> Button will change to <SAVE>.</p> <ul style="list-style-type: none"> • <Standard Goals> - Auto populates the organization's name and goals in the designated fields. • <Exit> - Returns you to the Core Document Development Window.

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Modifying a Core Document, Continued

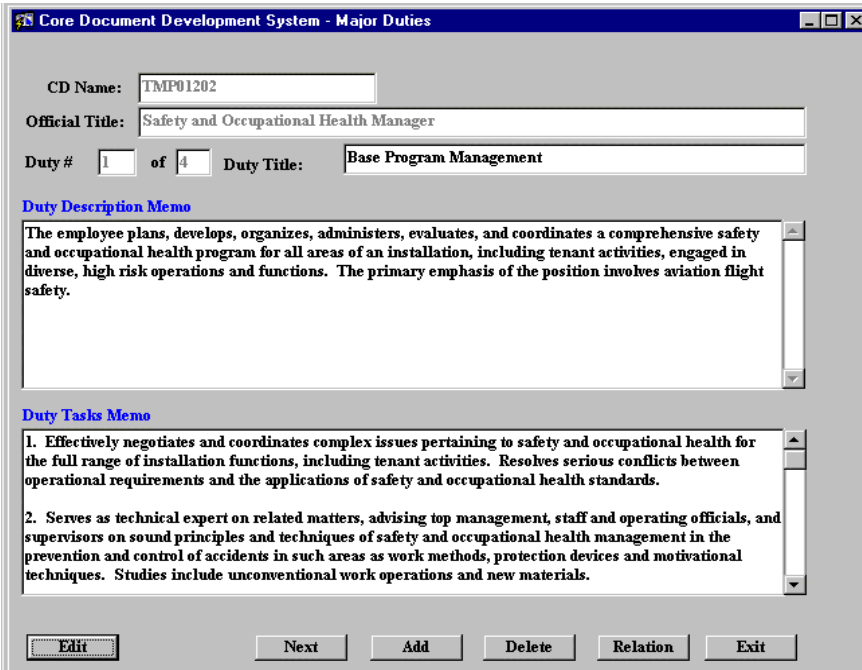
Modifying Goals and Purpose (continued)

Step	Action
2	Place your cursor in the data field that needs editing. Click <Edit> and make the necessary changes.
3 	Click <Save> to save your changes. Note: The button returns to <Exit> , once Save is clicked.
4	Click <Exit> to return to the Core Document Development Window .

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Modifying a Core Document, Continued

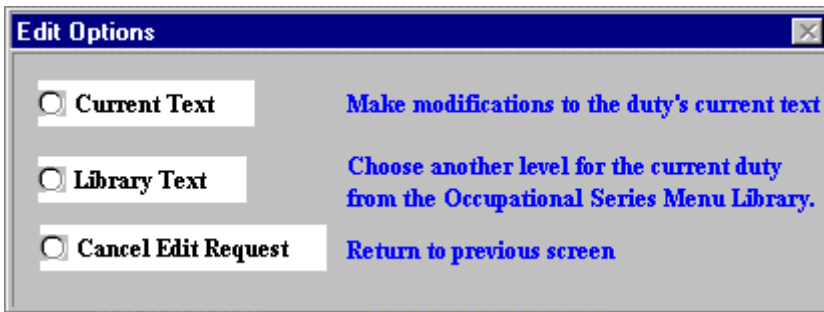
Editing Major Duties

Step	Action
1	Click Edit , then click Major Duties on the Main Menu Bar.
2	<p>The Core Document Development System - Major Duties Window displays with the information automatically populated.</p> 

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Modifying a Core Document, Continued

Editing Major Duties (continued)

Step	Action
3	<p>Click <Edit> to edit the displayed duty statement, or</p> <p>Click <Next> to view the next duty statement, or</p> <p>Click <Add> to add a new duty statement, or</p> <p>Click <Delete> to delete the current duty statements, or</p> <p>Click <Relation> to understand the connections between individual duty statements and the classification knowledge and training competencies, or</p> <p>Click <Exit> to exit the window.</p>
4	<p>Click <Edit> to display the Edit Options Dialog Box, which allows you to select one of the three options, described in clear text.</p>  <p>Click Current Text.</p>
5	<p>The Duty Statement for Level 1 Window displays.</p> <p>Place your cursor in one of the text boxes to change any of the text or to delete the current text and type in the new text.</p> <p>Click <Edit> to modify the text. The duty statement displays.</p> <p>Delete and make changes as needed.</p>

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Modifying a Core Document, Continued

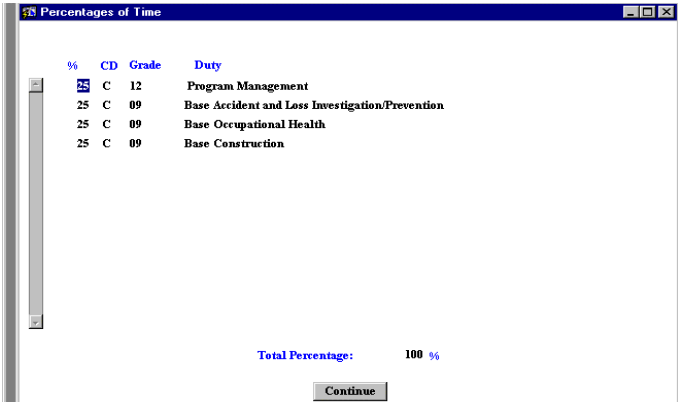
Editing Major Duties (continued)

Step	Action
6	Click < Save >.
7	Click < Next > to view the next duty statement on the Core Document Development System – Major Duties Window. Use your Edit and Save buttons to continue editing your document, or Click < Add > to add a new duty statement to the Core Document Development System – Major Duties Window, or Click < Delete > to delete a duty from the Core Document Development System – Major Duties Window.
8	Click < Exit > when you complete editing the major duties.

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Modifying a Core Document, Continued

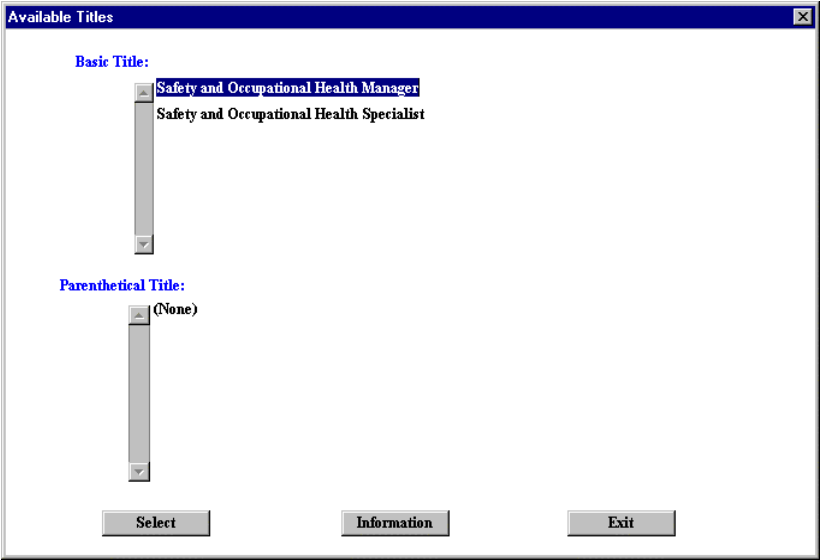
Modifying Percentages of Assigned Duties

Step	Action
1	Click E dit and click P ercentages on the Main Menu Bar.
2	<p>The Percentages of Time Window displays with a list of duties selected for a CD and the percentages of time spent performing each duty or work objective with the total percentage shown at the bottom. Normally, it totals 100 percent but may fall within a range of 90-100. If the total is more than 90 and less than 100, the additional duty statement “Performs Other Duties as Assigned” displays.</p> <p>Click the desired number to be changed and enter the new number.</p> <p>If you select the CRITICAL/NONCRITICAL setting, a column displays between percentage and duty. All duties are indicated as critical with a “C” in the column. To change a duty to non-critical, type an “N” over the desired “C” in the column.</p> 

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Modifying a Core Document, Continued

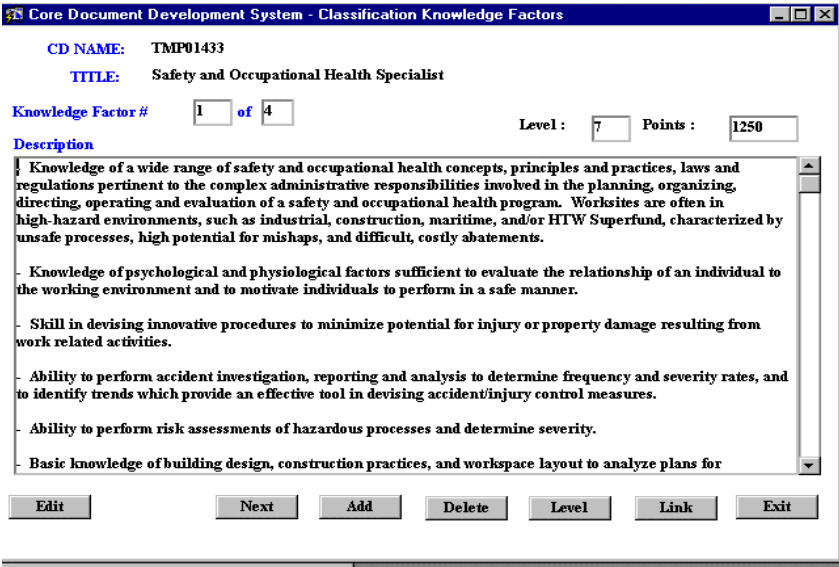
Modifying Percentages of Assigned Duties (continued)

Step	Action
3	Click <Continue>.
4	The Please Wait Dialog Box displays stating “Processing information into the database...”
5	<p>The Available Titles Window displays. Make modifications as needed using these buttons.</p> <p>Click <Select> - to make the title selection.</p> <p>Click <Information> - to see information about titling practices appropriate for the position.</p> <p>Click <Exit> to return to the Main Menu.</p> 

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Modifying a Core Document, Continued

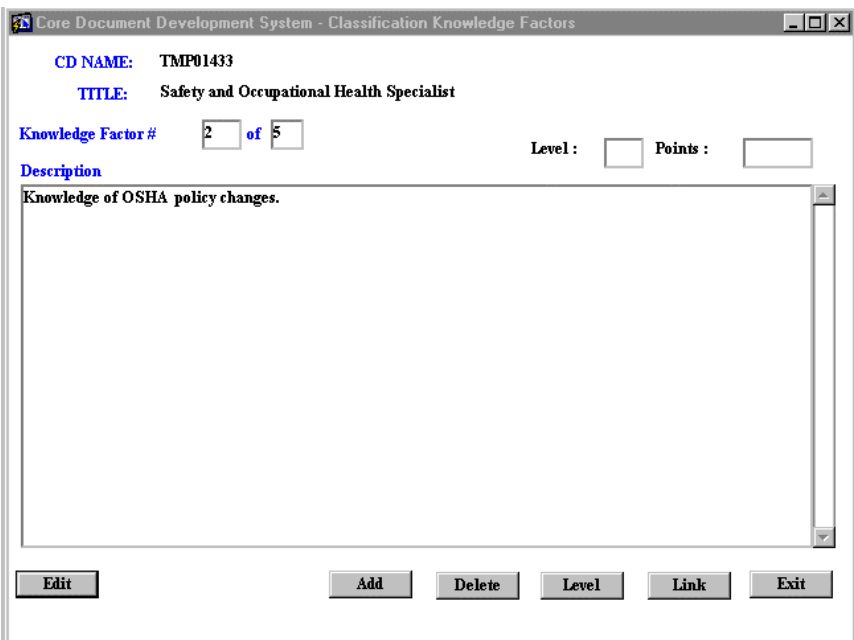
Editing Knowledge Factors

Step	Action
1	Click Edit and click Knowledge Factors on the Main Menu Bar.
2	<p>The Core Document Classification Knowledge Factors Window displays.</p> <p>Click <Add> to include a new knowledge factor, which creates a new record and attaches it, to the end of the knowledge factors section.</p> 

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Modifying a Core Document, Continued

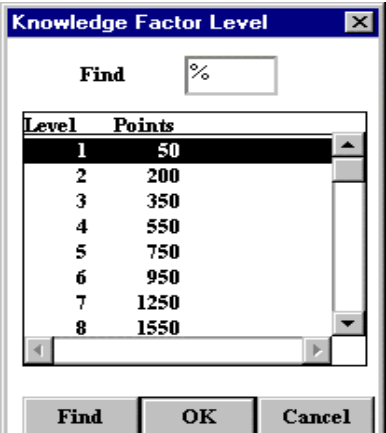
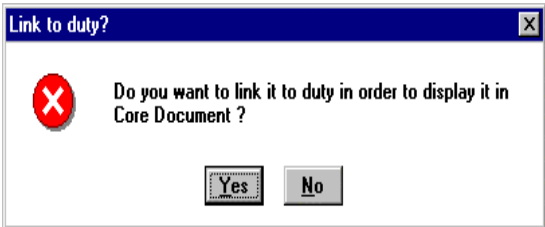
Editing Knowledge Factors (continued)

Step	Action
3	<p>The Core Development System – Classification Knowledge Factors Window displays. Type in the additional knowledge factor in the <i>Description</i> field. Click <Add>.</p> <p>Caution: If you delete a classification knowledge, it could impact on the classification of the position.</p> 

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Modifying a Core Document, Continued

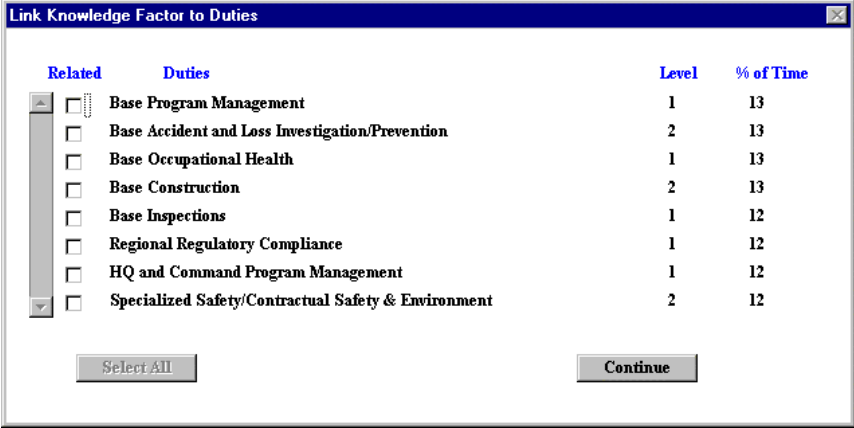
Editing Knowledge Factors (continued)

Step	Action																		
4	<p>The Knowledge Factor Level Flexfield displays. Select Level and Points. Click <OK>.</p>  <table border="1" data-bbox="805 657 1151 898"> <thead> <tr> <th>Level</th><th>Points</th></tr> </thead> <tbody> <tr><td>1</td><td>50</td></tr> <tr><td>2</td><td>200</td></tr> <tr><td>3</td><td>350</td></tr> <tr><td>4</td><td>550</td></tr> <tr><td>5</td><td>750</td></tr> <tr><td>6</td><td>950</td></tr> <tr><td>7</td><td>1250</td></tr> <tr><td>8</td><td>1550</td></tr> </tbody> </table>	Level	Points	1	50	2	200	3	350	4	550	5	750	6	950	7	1250	8	1550
Level	Points																		
1	50																		
2	200																		
3	350																		
4	550																		
5	750																		
6	950																		
7	1250																		
8	1550																		
5	<p>The Link to duty? Dialog Box displays and asks, “Do you want to link it to a duty in order to display it in the Core Document?” Click <Y<u>e</u>s>.</p> 																		

Continued on next page

Modifying a Core Document, Continued


Editing Knowledge Factors (continued)

Step	Action
6	<p>The Link Knowledge Factor to Duties Window displays. Select one of the two Taskflow Buttons.</p> <p><Select All> - Links the new knowledge factor with the duty statements.</p> <p><Continue> - Returns to the previous window.</p> <p>To select a related duty, click on the check boxes next to a duty name.</p> <p>You can click <Select All> or select individually by checking the related check boxes.</p>  <p>Click <Continue>.</p>
7	<p>The Core Document Development System – Classification Knowledge Factors Window displays.</p> <p>Click <Exit> to return to the Main Menu.</p>

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Modifying a Core Document, Continued

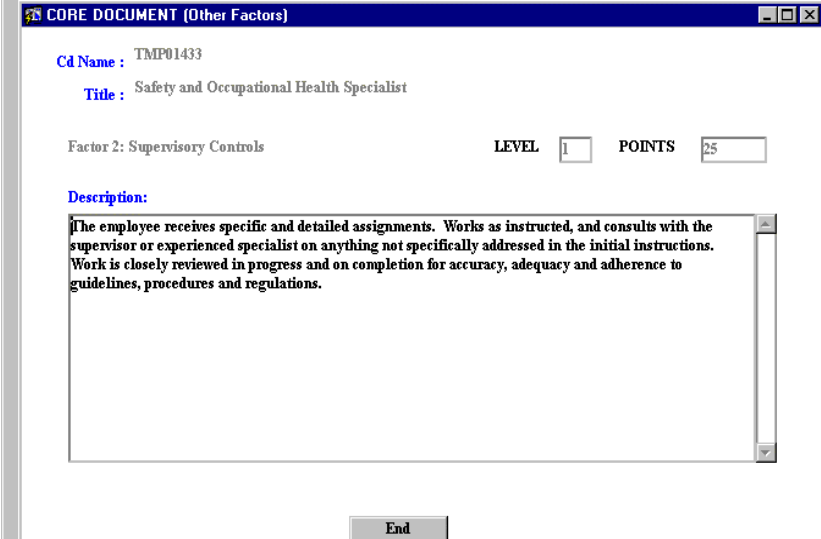
Editing Other Factors

Step	Action
1	Click Edit and click Other Factors on the Main Menu Bar.
2	<p>The COREDOC (Other Factors) Window displays.</p> <p><Edit> –Edits a classification factor.</p> <p><Next> - Views the next knowledge factor.</p> <p><Library> - Lists other factor level options from the occupational database library.</p> <p><Exit> – Returns to the Main Menu.</p>  <p>Click <Edit>.</p>

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Modifying a Core Document, Continued

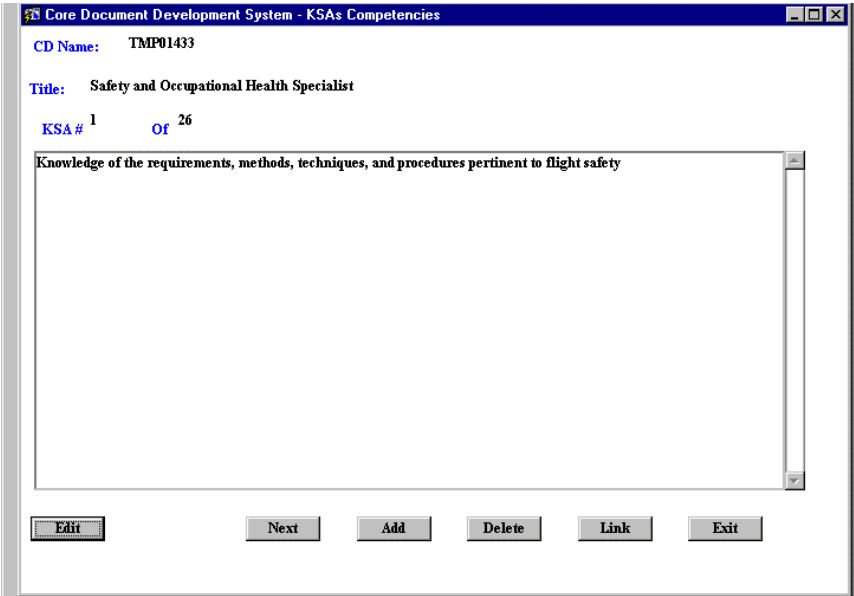
Editing Editing Other Factors (continued)

Step	Action
3	<p>The CORE DOCUMENT (Other Factors) Window displays. Make the necessary changes in the knowledge factors in the Description field.</p>  <p>Click <End>.</p>
4	<p>You are returned to the CORE DOCUMENT [Other Factors] Window. Click <Exit> to return to the Main Menu.</p>

Continued on next page

Modifying a Core Document, Continued

Editing KSAs (Competencies)

Step	Action
1	Click Edit , then click KSAs on the Main Menu.
2	<p>The Core Document - KSAs Competencies Window displays. You are presented with six buttons from which to make a selection.</p> <p><Edit> –Edits the displayed competency (KSA). <Next> – View the next competency (KSA). <Add> – Add a new competency (KSA). <Delete> –Delete the current competency (KSA). <Link> –Links one or more competencies to a Duty Statement. <Exit> – Returns to the Main Menu.</p> <p>Click <Link>.</p> 

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Modifying a Core Document, Continued

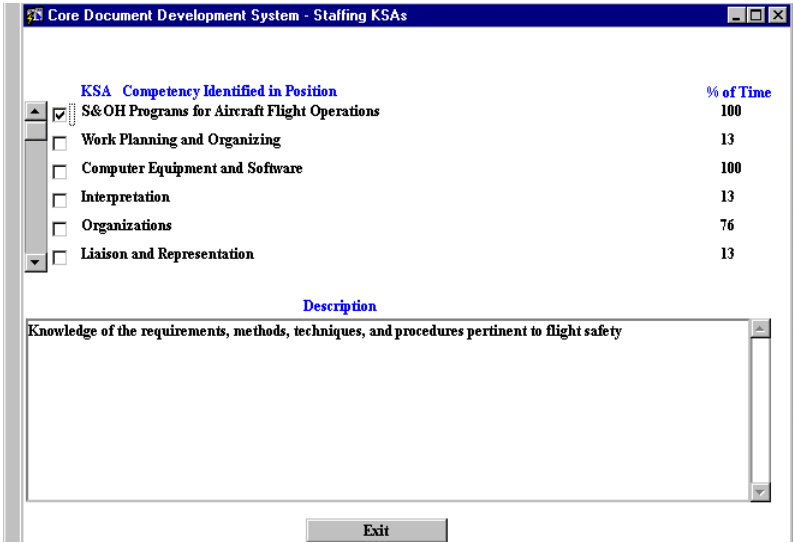
Editing KSAs (Competencies) (continued)

Step	Action																																				
3	<p>The Link KSA to Duties Window displays with two buttons.</p> <p>Click the check boxes next to duties, as needed.</p> <p>Click <Continue>.</p> <div><div>Link KSA to Duties</div><table><thead><tr><th>Related</th><th>Duties</th><th>Level</th><th>% of Time</th></tr></thead><tbody><tr><td><input checked="" type="checkbox"/></td><td>Base Program Management</td><td>1</td><td>13</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Base Accident and Loss Investigation/Prevention</td><td>2</td><td>13</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Base Occupational Health</td><td>1</td><td>13</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Base Construction</td><td>2</td><td>13</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Base Inspections</td><td>1</td><td>12</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Regional Regulatory Compliance</td><td>1</td><td>12</td></tr><tr><td><input checked="" type="checkbox"/></td><td>HQ and Command Program Management</td><td>1</td><td>12</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Specialized Safety/Contractual Safety & Environment</td><td>2</td><td>12</td></tr></tbody></table><div><div>Select All</div><div>Continue</div></div></div>	Related	Duties	Level	% of Time	<input checked="" type="checkbox"/>	Base Program Management	1	13	<input checked="" type="checkbox"/>	Base Accident and Loss Investigation/Prevention	2	13	<input checked="" type="checkbox"/>	Base Occupational Health	1	13	<input checked="" type="checkbox"/>	Base Construction	2	13	<input checked="" type="checkbox"/>	Base Inspections	1	12	<input checked="" type="checkbox"/>	Regional Regulatory Compliance	1	12	<input checked="" type="checkbox"/>	HQ and Command Program Management	1	12	<input checked="" type="checkbox"/>	Specialized Safety/Contractual Safety & Environment	2	12
Related	Duties	Level	% of Time																																		
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<input checked="" type="checkbox"/>	HQ and Command Program Management	1	12																																		
<input checked="" type="checkbox"/>	Specialized Safety/Contractual Safety & Environment	2	12																																		
4	<p>You are returned to the previous window. Click <Exit> to return to the Main Menu.</p>																																				

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Modifying a Core Document, Continued

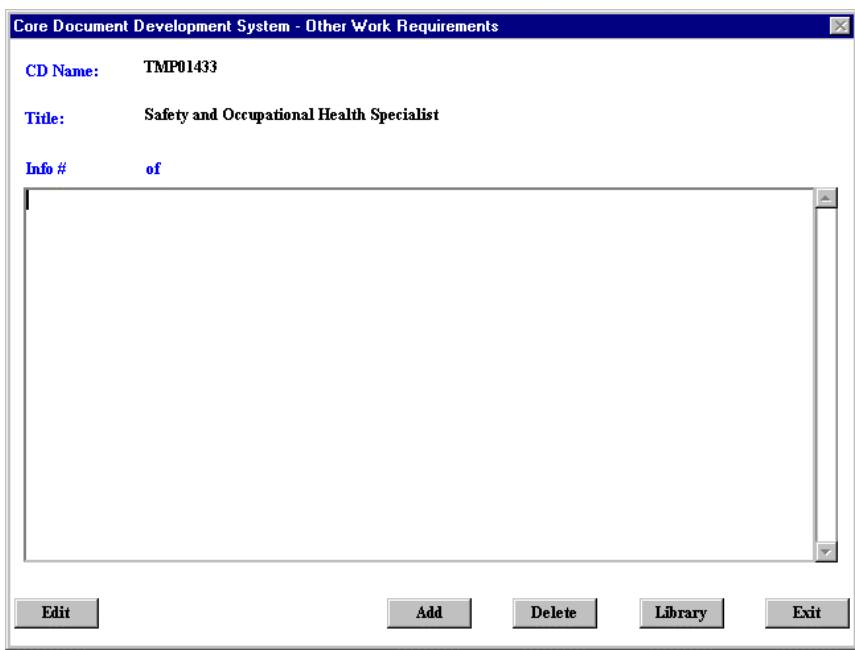
Editing Staffing KSAs

Step	Action
1	Click E dit, then click S elect Staffing KSAs on the Main Menu.
2	<p>The Core Document Development System – Staffing KSAs Window displays.</p> <p>Click the appropriate check boxes next to each KSA Competency.</p> <p>Click <Exit> to return to the Main Menu.</p> 

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Modifying a Core Document, Continued

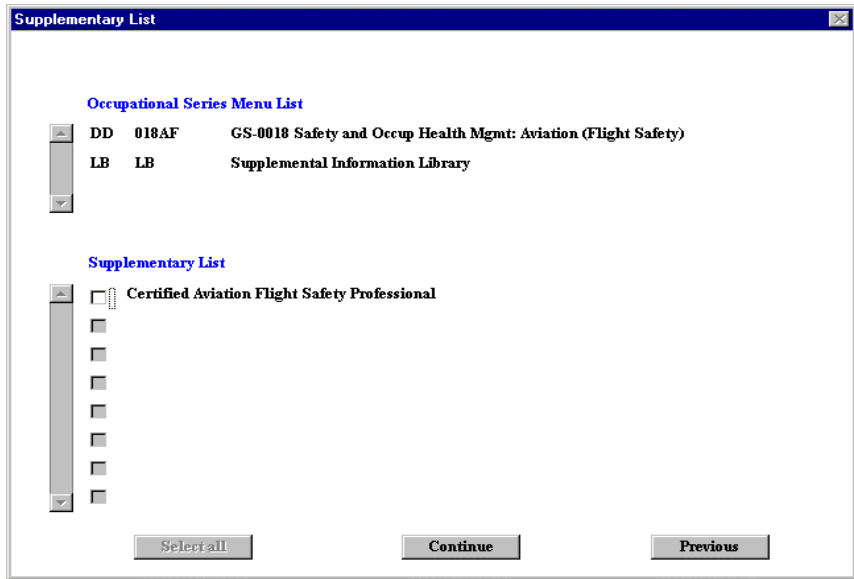
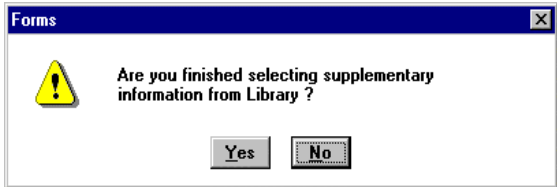
Modifying Other Work Requirements

Step	Action
1	Click E dit, then click O ther Work R equirements on the Main Menu.
2	<p>The Core Document Development System – Other Work Requirements Window displays.</p> <p>Click <Library> to view a list of supplemental items for an occupational series.</p> 

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Modifying a Core Document, Continued

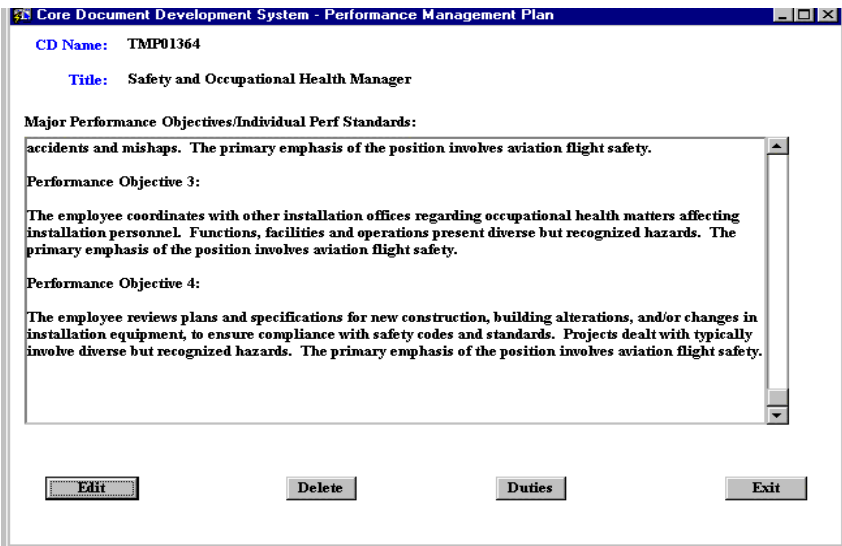
Modifying Other Work Requirements (continued)

Step	Action
3	<p>The Supplementary List Window displays. Click the check boxes desired from the <i>Supplementary List</i> and click <Continue>.</p> 
4	<p>The Forms Dialog Box displays, asking, “Are you finished selecting supplementary information from Library?”</p> <p>Click <Yes>.</p> 
5	<p>The Core Document Development System – Other Work Requirements Window displays again with your changes. Review and click <Exit> to return to the Main Menu.</p>

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Modifying a Core Document, Continued

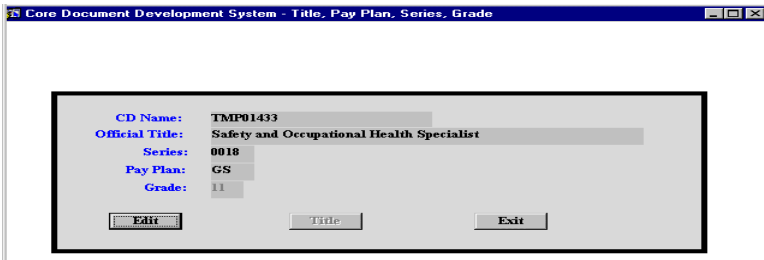
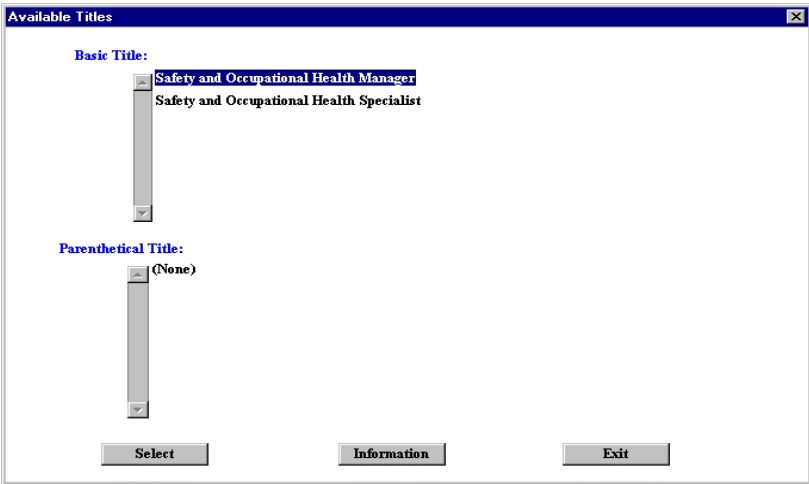
Modifying the Performance Management Plan

Step	Action
1	Click Edit , then click Performance Management Plan on the Main Menu.
2	<p>The Core Document Development System – Performance Management Plan displays with four Taskflow Buttons. Click <Duties> to select the Standard Performance Requirements.</p> 
3	<p>Note: The Main Menu or a component-specific Performance Management Plan Window will display. The window displays if a CPCN assigned to the core document.</p> <p>Click <Edit> to modify a performance element. Use the scroll bar to navigate through the performance elements.</p> <p>Click <Delete> to remove all of the performance elements from the CD.</p>
4	Click <Exit> to return to the Main Menu.

Continued on next page

Modifying a Core Document, Continued

Editing the Title/Pay Plan/Series

Step	Action
1	Click E dit, then click T itle/ P ay Plan/ S eries on the Main Menu.
2	<p>The Core Document Development System – Title, Pay Plan, Series, Grade Window displays.</p> <p>Click <Edit>.</p> 
3	<p>The same window displays with <i>Official Title</i> highlighted and the three option buttons <Edit>, <Title>, and <Exit>.</p> <p>Click Title.</p>
4	<p>The Available Titles Window displays with three Taskflow Buttons.</p> <p><Select> - To make the title selection.</p> <p><Information> -To view Occupational Information.</p> <p><Exit> -To return to the previous screen.</p> <p>Click your title selection and click <Select>.</p> 

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Modifying a Core Document, Continued

Step	Action
5	The Core Document Development System – Title, Pay Plan, Series, Grade Window displays with the newly selected title. Click <Exit> to return to the Main Menu.

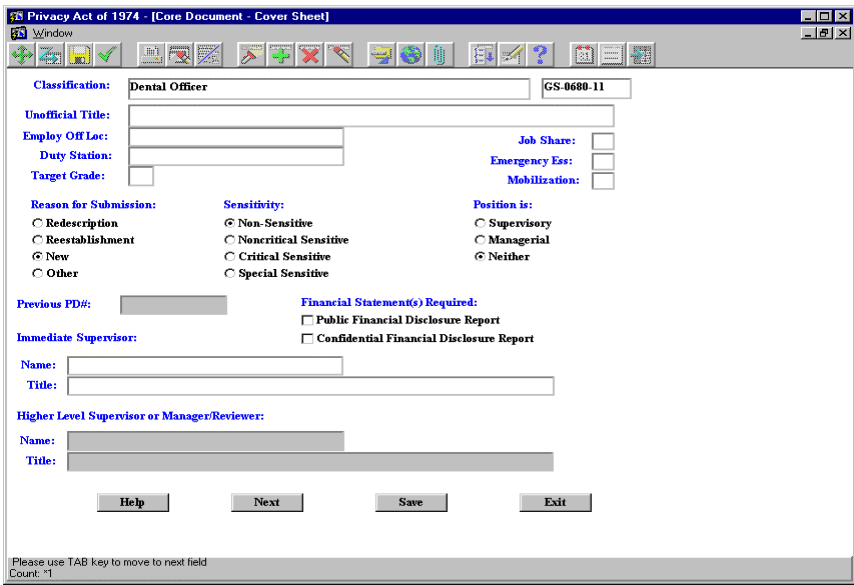
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Modifying a Core Document, Continued

Editing the Cover Sheet



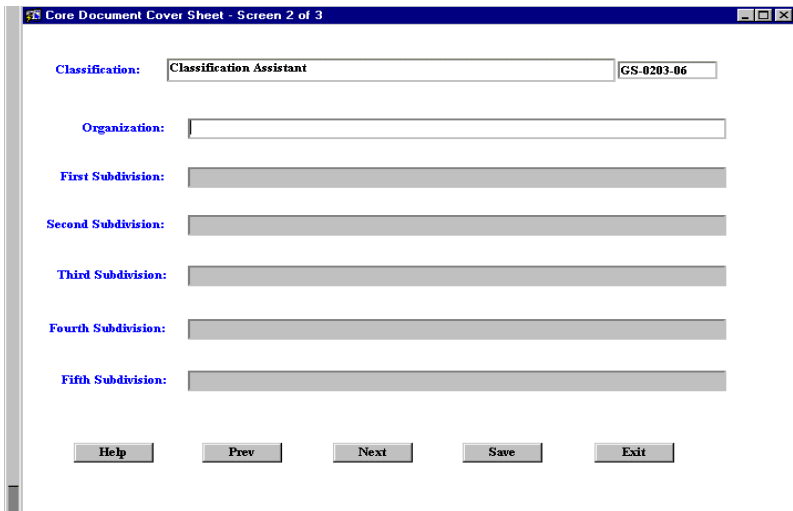
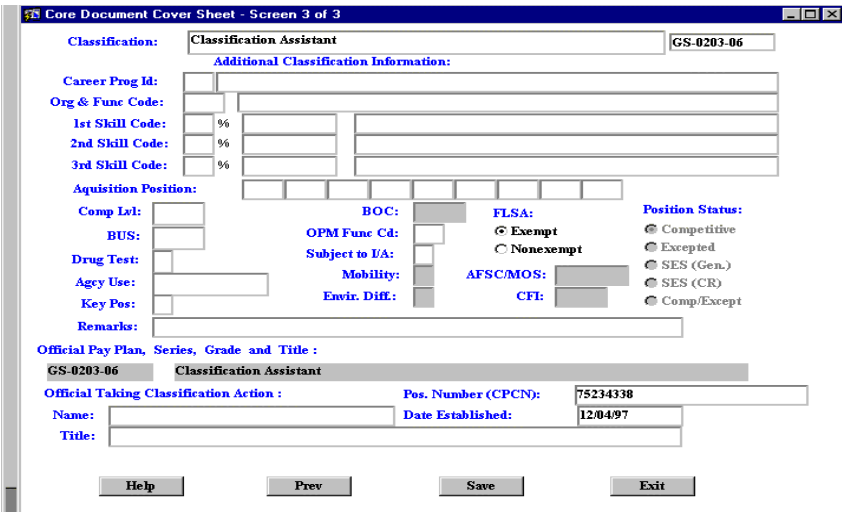
Note: Only users with the Classifier or Super User role can access the Cover Sheet. The Cover Sheet will vary from Component to Component.

Step	Action
1	Click Edit then click Cover Sheet on the Main Menu.
2	<p>The Core Document – Cover Sheet Window displays with four Taskflow Buttons. Change information in the needed data fields. Click Save and then click <Next>.</p> 

Continued on next page

Modifying a Core Document, Continued

Editing the Cover Sheet (continued)

Step	Action
3	<p>Core Document Cover Sheet – Screen 2 of 3 displays with five Taskflow Buttons. Input information in the needed data fields. Click Save and then click <Next>.</p> 
4	<p>Core Document Cover Sheet – Screen 3 of 3 displays with four Taskflow Buttons. Change information in the needed data fields. Click <Save>.</p> 

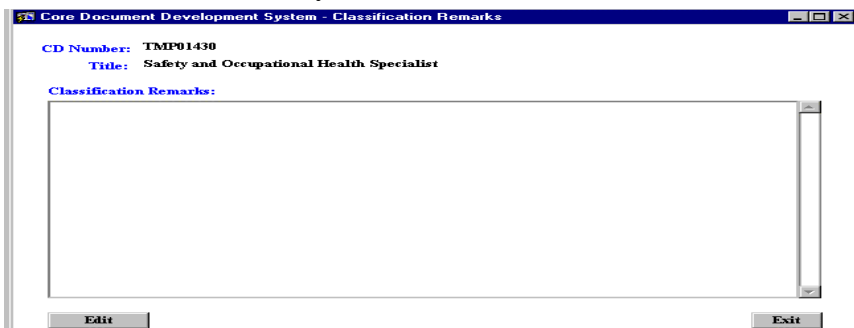
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Modifying a Core Document, Continued

Editing the Cover Sheet (continued)

Step	Action
5	Click <Exit> to return to the Main Menu.

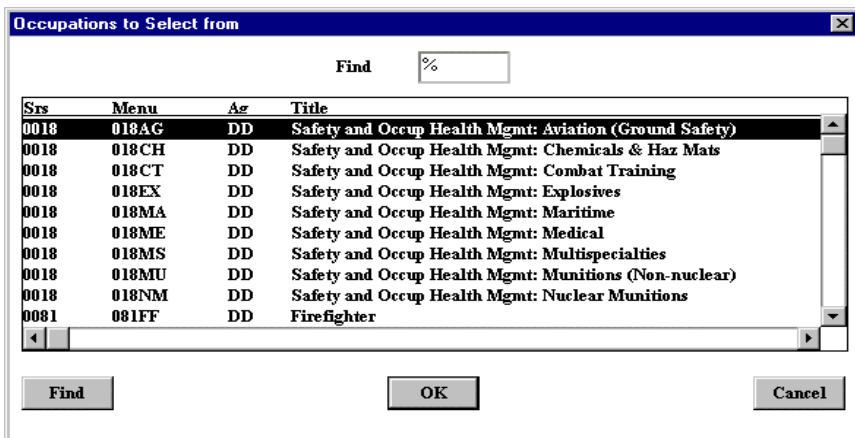
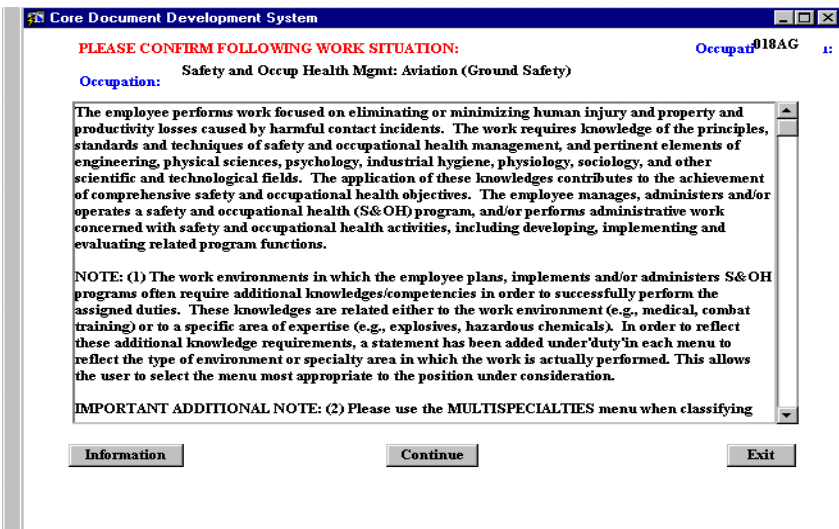
Editing Classification Remarks

Step	Action
1	Click E dit, then click C lassification Remarks on the Main Menu
2	<p>The Core Document Development System – Classification Remarks Window displays with two Taskflow Buttons.</p> <p>Click <Edit> and place your cursor in the <i>Classification Remarks</i> data field and type your input.</p> <p>Click <End Edit> once you have finished.</p> 
3	Click <Exit> to return to the Main Menu.

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Modifying a Core Document, Continued

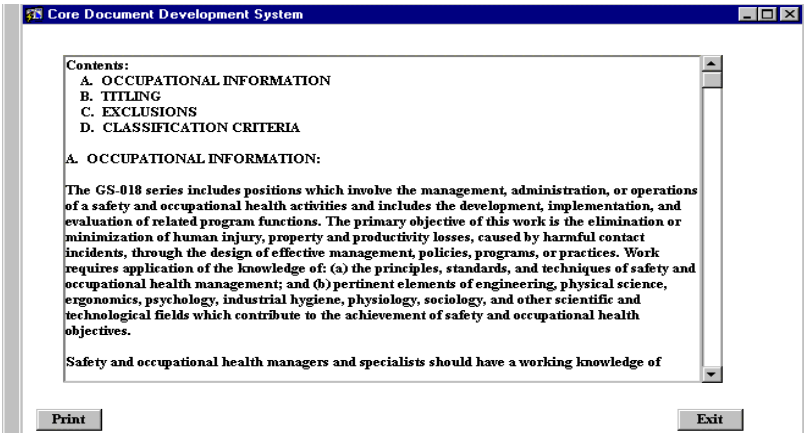
Adding More Occupations

Step	Action
1	Click Edit , then click More Occupations on the Main Menu.
2	<p>The Occupations to Select from Window displays. Click the occupation(s) you plan to add.</p> <p>Click <OK>.</p> 
3	<p>The Core Document Development System Window displays with three Taskflow Buttons.</p> <p>The message asks, "PLEASE CONFIRM FOLLOWING WORK SITUATION." Review the information.</p> <p>Click <Exit>.</p> 

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Modifying a Core Document, Continued


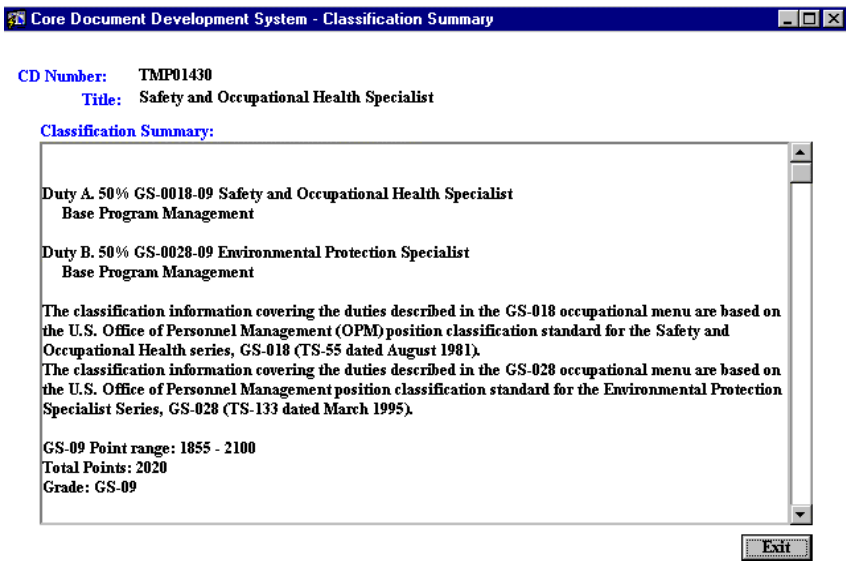
Adding More Occupations (continued)

Step	Action
4	<p>The Core Document Development System Window displays. The contents of the added occupation are displayed and ready to be printed, if desired.</p> <p>Click <Exit> to return to the Main Menu.</p>  <p>The screenshot shows a window titled "Core Document Development System". Inside, there is a section labeled "Contents:" with a list: A. OCCUPATIONAL INFORMATION, B. TITLING, C. EXCLUSIONS, and D. CLASSIFICATION CRITERIA. Below this, under "A. OCCUPATIONAL INFORMATION:", there is a paragraph describing the GS-018 series as involving management, administration, or operations of safety and occupational health activities. At the bottom of the window, there are two buttons: "Print" and "Exit".</p>

Continued on next page

Modifying a Core Document, Continued

Adding the Classification Summary

Step	Action
1	Click E dit, then click C lassification Summary on the Main Menu.
2	<p>The Core Document Development System – Classification Summary Window displays. It provides a brief explanation of the basis for the classification title, pay plan, series, and grade.</p> <ul style="list-style-type: none"> • The CD Number and Title are at the top. • A brief explanation states how the percentages of time for the duties affect the classification. <p> Note: You cannot edit the information. Changes made to title, pay plan, series, any duty, factor, or Competency (KSA) made earlier will be noted here.</p> 
3	Click <Exit> to return to the Main Menu.


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Attaching a Core Document to the Request for Personnel Action (RPA)

Purpose Many Request for Personnel Actions (RPAs) require a core document (CD). You can attach a CD to a previously completed RPA or create a new RPA and attach a CD. This procedure guides you through attaching a CD to the RPA after the position has been built.

Section Contents

- Retrieving the RPA
- Attaching the Core Document
- Assigning a CPCN
- Creating a Cover Sheet
- Exiting, Saving, and Routing

See Also  Module 2, Personnel Management and Classification Using the Modern DCPDS

- Chapter 1, Building a Position
- Chapter 2, Managing Positions
 - Validating a Position
 - Quick Copying a Position
- Chapter 4, Creating a CD

Module 1, Fundamentals of the Modern DCPDS

- Chapter 3, Navigating the Modern DCPDS
 - Attaching a Document

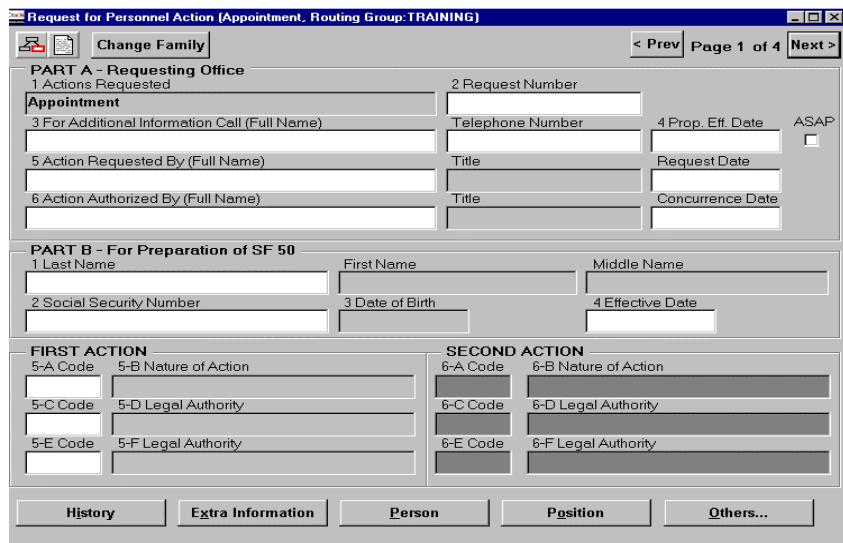
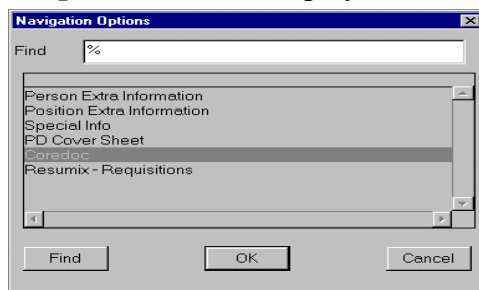
Before You Begin

- The following sequence of events occur when attaching a CD to the RPA:
 - A. Create a Core Document (CD)
 - B. Preview a CD
 - C. Attach a CD to the RPA
- You can attach a CD to the RPA without assigning a CPCN or a Cover Sheet, and you do not have to have a position attached to an RPA.
- To assign a CPCN to a CD, it must first be attached to the RPA. The CPCN includes the PD# and the Sequence # as they appear on the position *Name* data field of the Position Window.
- You can create a CD through the COREDOC Application or through the RPA.
- In order to create or edit the Cover Sheet on the CD, it must first be attached to an RPA.
- Only users with a classifier role can assign CPCNs and edit cover sheets.
- The RPA Windows and buttons are explained in detail in Module 3.

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Attaching a Core Document to the Request for Personnel Action (RPA), Continued

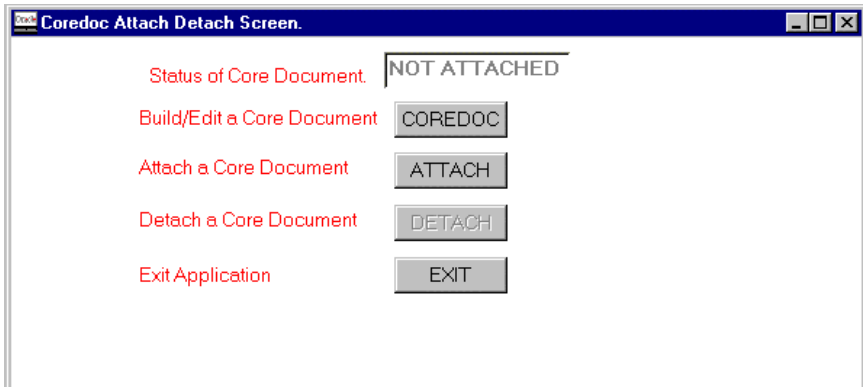
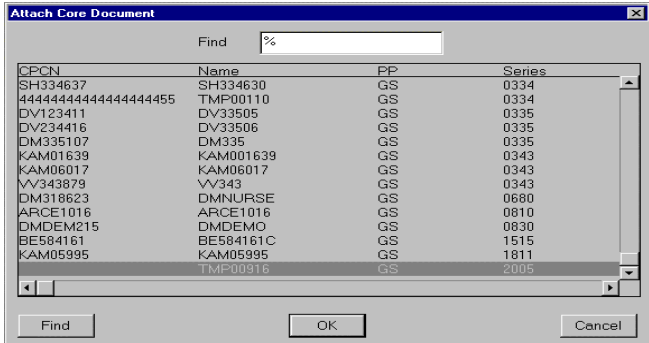
Retrieving the RPA

Step	Action
1	On the Navigator Window → <i>Request for Personnel Action</i> → <i>Recruit/Fill</i> → <Open> .
2	<p>Page 1 of 4 of the Request for Personnel Action Window (Recruit/Fill) displays. You will use this RPA to attach the CD.</p> <p>With the cursor in Block 6, Action Authorized By data field, click the LOV on the Toolbar, click selection, and click <OK>.</p> 
3	Click <Others...> .
4	<p>The Navigation Options Window displays.</p>  <p>Click Coredoc.</p> <p>Click <OK>.</p>

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Attaching a Core Document to the Request for Personnel Action (RPA), Continued



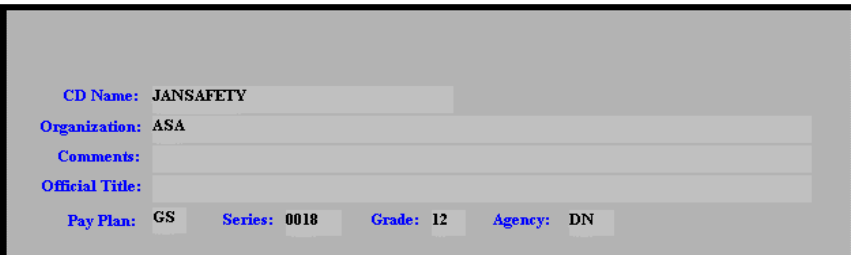
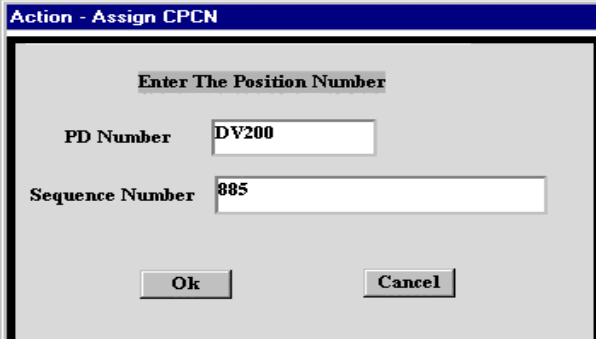
Attaching the Core Document

Step	Action
1	<p>The Coredoc Attach Detach Screen Window displays. Four options are listed.</p>  <p>Click ATTACH to attach a previously built COREDOC.</p>
2	<p>The Attach Core Document Window displays.</p>  <p>Click the CD you want to attach to the RPA.</p>
3	Click <OK> .
4	<p>The Coredoc Attach Detach Screen Window displays again.</p> <ul style="list-style-type: none"> The ATTACH button has a dotted line around it to indicate the CD is attached. <p>Click the COREDOC button to open the Core Document Development System Window to insure it has been attached.</p>

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Attaching a Core Document to the Request for Personnel Action (RPA), Continued

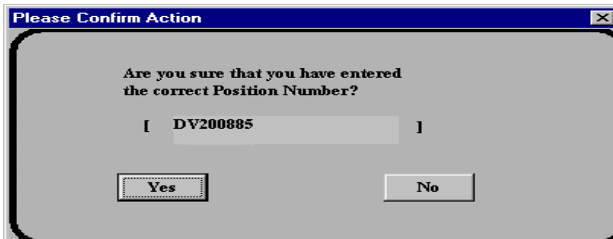
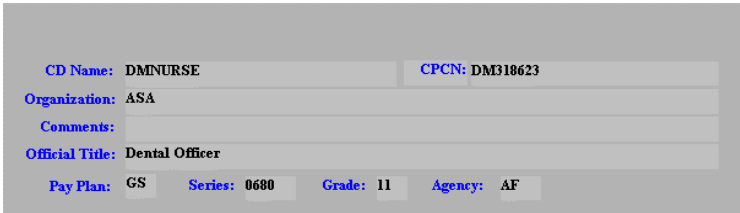
Assigning a CPCN

Step	Action
<p>1</p> 	<p>To assign a CPCN to the CD, click Utility on the Main Menu and then click Assign CPCN.</p> <p>Note: Before you can assign a CPCN to a CD, it must be attached to the RPA.</p>  
<p>2</p>	<p>The Action — Assign CPCN Window displays.</p>  <p>Input the PD Number and the Sequence Number. Both numbers are from the Position Build. Click <OK>.</p>


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Attaching a Core Document to the Request for Personnel Action (RPA), Continued

Attaching the Core Document (continued)

Step	Action
3	<p>The Please Confirm Action Window displays.</p>  <p>Click <Yes>. The Record Update Window displays briefly.</p>
4	<p>The Core Document Development System Window displays with the CPCN in the CPCN data field.</p> 

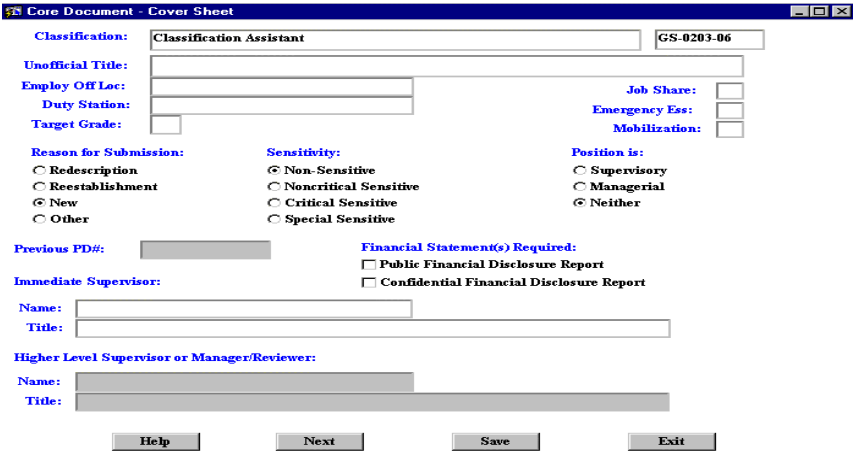
Creating a Cover Sheet

Step	Action
<p>1 </p>	<p>Click Edit and click Cover Sheet on the Main Menu.</p> <p>Note:</p> <ul style="list-style-type: none"> The CD must be attached to an RPA to access the cover sheet. You must be in a Classifier or Super User role to access the cover sheet.

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Attaching a Core Document to the Request for Personnel Action (RPA), Continued

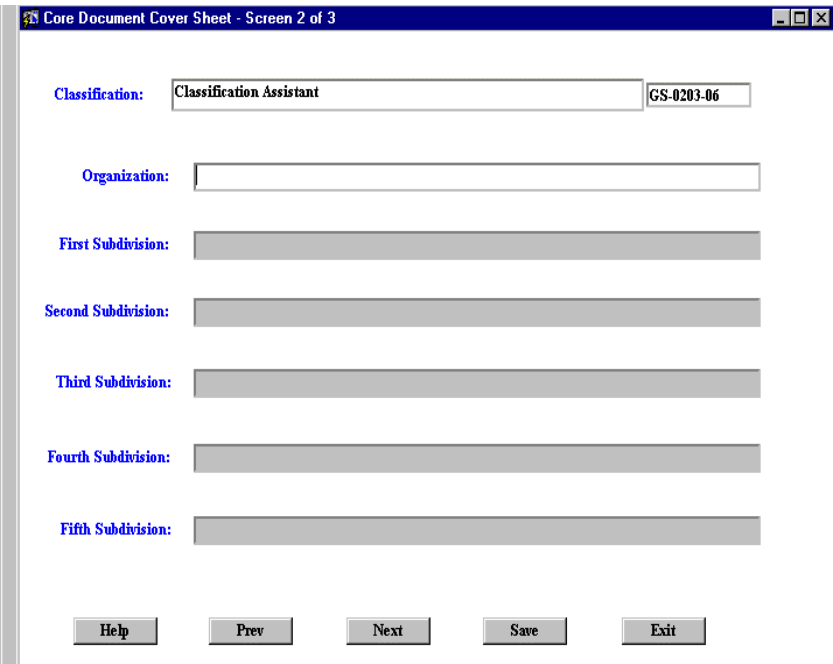
Creating a Cover Sheet (continued)

Step	Action
2	<p>The Core Document – Cover Sheet Window displays with four Taskflow Buttons.</p>  <p>< Help > - Accesses an LOV for a data field on the Cover Sheet.</p> <p>< Next > - Displays the next page of the Cover Sheet for viewing.</p> <p>< Save > - Saves the information entered on the window.</p> <p>< Exit > - Returns to the Main Menu Window.</p> <p>Input the information required in the data fields. Click < Save >. Click < Next >.</p>

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Attaching a Core Document to the Request for Personnel Action (RPA), Continued

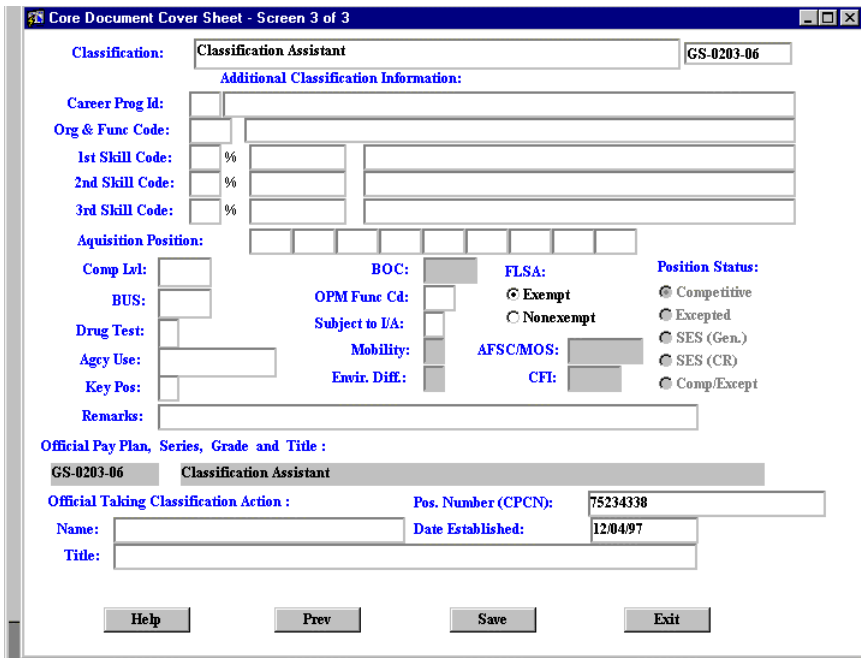
Creating a Cover Sheet (continued)

Step	Action
3	<p>The Core Document Cover Sheet – Screen 2 of 3 Window displays. Input the required information in the data fields.</p>  <p>Click <Next>.</p>

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Attaching a Core Document to the Request for Personnel Action (RPA), Continued

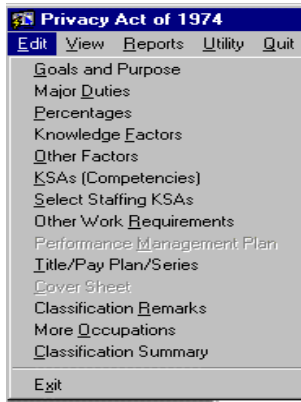
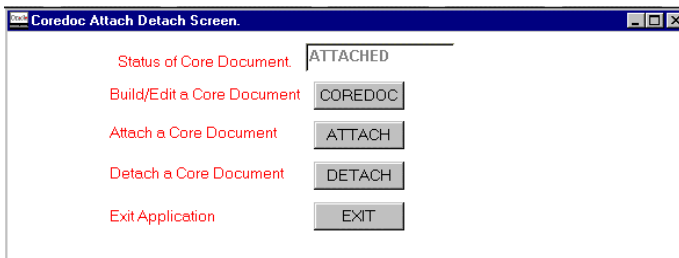
Creating a Cover Sheet (continued)

Step	Action
4	<p>The Core Document Cover Sheet – Screen 3 of 3 Window displays.</p> <p>Input the needed information in the required data fields.</p>  <p>Click <Save>. A Dialog Box displays, asking: “Do you really want to save?” Click <Yes>.</p>
5	Click < Exit > to return to the Main Menu.

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Attaching a Core Document to the Request for Personnel Action (RPA), Continued

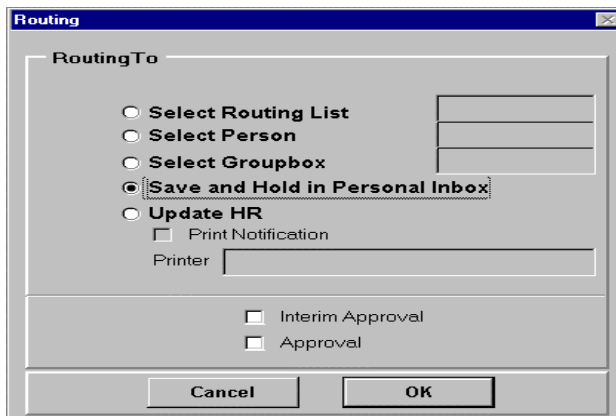
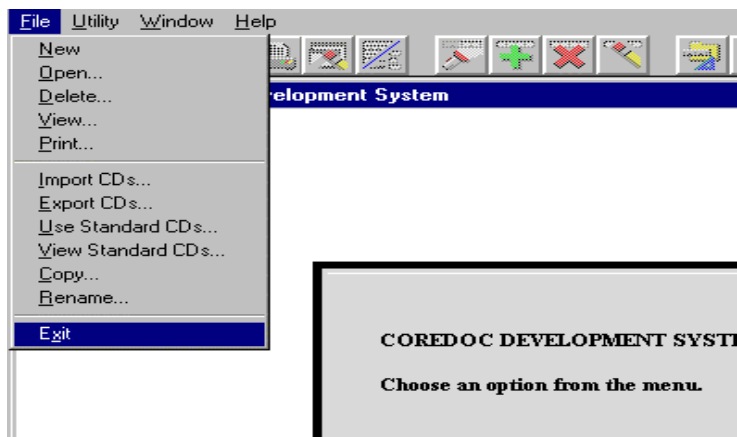
Exiting, Saving and Routing

Step	Action
1	<p>Click Edit on the Main Menu Bar and then click Exit.</p> 
2	<p>The Coredoc Attach Detach Screen Window displays.</p>  <p>Click EXIT.</p>
3	<p>The Request for Personnel Action Window displays. Click Save on the Toolbar.</p>
4	<p>The Dialog Box displays and asks, “Do you wish to route the Request for Personnel Action now?”</p> <p>Click <Yes>.</p>

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Attaching a Core Document to the Request for Personnel Action (RPA), Continued

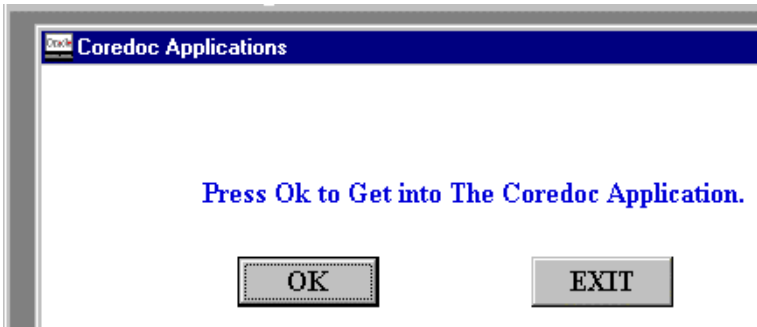
Exiting, Saving, Routing (continued)

Step	Action
5	<p>The Routing Window displays with the “Save and Hold in Personal Inbox” selected. Click <OK>.</p> 
6	<p>Click File on the Main Menu Bar of COREDOC Development System Window. From the drop-down menu, click Exit.</p> 

Continued on next page

Attaching a Core Document to the Request for Personnel Action (RPA), Continued

Exiting, Saving, Routing (continued)

Step	Action
7	The <i>Please Confirm</i> Dialog Box displays. Click <Yes>.
8	<p>The Coredoc Applications Window displays. Click <EXIT>. You are returned to the Navigator Window.</p> 

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